NWT Tourism Inventory and Gap Analysis

Final Report

Prepared for

Northwest Territories Tourism

In partnership with

Northwest Territories Resources, Wildlife and Economic Development

Aboriginal Business Canada

Canada

Indian and Northern Affairs Canada

Affaires indiennes et du Nord Canada

Prepared by

The Centre for Tourism Research
School of Tourism
University College of the Cariboo

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NWT Tourism Product Inventory & Gap Analysis
Final Report – March 30, 2005

Introduction

Northwest Territories Tourism, along with funding partners Aboriginal Business Canada, Indian and Northern Affairs Canada, and the Government of the Northwest Territories, issued a Request for Proposal for a Tourism Product Inventory and Gap Analysis in July 2004. The RFP spelled out that a comprehensive inventory and analysis is required to provide strategic direction for tourism business development. A proposal was submitted on August 4, 2004 by a project team comprised of faculty and associate researchers with The University College of the Cariboo's Centre for Tourism Research. The project began on October 1st.

Background

The Northwest Territories possess assets in tourism that are second to none in the world. Between its borders lie majestic mountains, great rivers and lakes, plus people and their culture – tourism capital that has the potential to generate tremendous economic and social benefits.

Canada is one of the most popular destinations in the world. It was ranked 10th in 2003 with a 2.5% share of the global international tourism travel market. While there are significant differences between what Canada and the Northwest Territories have to offer the world in terms of tourism product, there are also similarities that can be capitalized.

Tourism is an important contributor to the economies of Canada and the Northwest Territories. Tourism expenditures in Canada totalled $52.1 billion in 2003, accounting for 2.0% of Gross Domestic Product. Non-resident and business tourism spending in the Northwest Territories equalled $95.3 million in 2003, contributing $35.4 million to GDP.

Tourism employment totalled 577,600 full and part-time jobs in Canada in 2003, and 774 full time job equivalents in the Northwest Territories.

As a sustainable industry that contributes to local economies and minimizes its environmental footprint while generating significant jobs and tax revenue, tourism is clearly a player on the economic field that should be taken seriously.

Northwest Territories Tourism works with Parks and Tourism, GNWT Department of Resources, Wildlife and Economic Development to promote the Northwest Territories as a world-class tourism destination. NWT Tourism is the Destination Marketing Organization for the NWT and is responsible for pan-territorial tourism marketing activities that includes advertising, production of travel guides, maintaining the tourism toll free and fulfillment service, media and trade relations, trade show attendance and providing tourism member services and programs.

NWT Tourism's 2003 Strategic Plan identified nine goals to be achieved by 2008:

- Raise the number of visitors from 40,100 to 42,226
- Raise tourism-generated revenues from $50.7 million to $52.3 million
- Increase tourism related employment to 1000 full time equivalent jobs
- Position the NWT as a four-season destination
- Improve the visitors experience
- Maximize marketing programs and partnerships
- Provide research, resources and a supportive business environment
- Promote and support tourism development while preserving the integrity of the cultural and natural environment
- Improve and increase training and educational awareness throughout the NWT

Its strategic plan also recognized that product development has not always been responsive to the needs of the market. This project's sponsors responded to that concern with the commission of this study.

Nature and Scope of the Project

The purpose of the tourism product inventory and gap analysis is to collect and analyze data on existing tourism products in the Northwest Territories. The inventory identifies the following data:

- name of tourism business
- name of business owner

- contact information including address, telephone number(s), fax number, e-mail address and website
- sector of tourism industry: ie. accommodation, food and beverage, transportation, attractions, adventure and recreation, events and conferences, travel trade, or tourism services
- aboriginal and non-aboriginal business ownership
- specifics related to each of the tourism sectors
- primary and secondary products offered
- operational seasonality
- capacity
- geographical area of operation

A few other features noted in the RFP are not included in the interim report. Price range, and occasionally capacity, are absent due to the difficulty operators experienced in responding to the questions.

The gap analysis is based upon the difference between the existing resources, infrastructure, natural features, community objectives, local expertise and its potential.

The Partners and the Consulting Team

The project team is led by Assistant Professor Jon Heshka and Adventure Programs Department Chair Gilles Valade. The team members include Dr. Robert Hood, Bridget Orsetti, Evan Loveless, Paul Chatterton and Billy Collins. The teams' background is grounded in reality and reflects a combination of real-world experience and academia. Prior projects include tourism opportunity studies, management plans and tourism business development plans.

Organization of Report

The report mirrors the Request for Proposals and is structured around the following major headings:

- Introduction
  - Background
  - Nature and Scope of the Project
  - The Partners and the Consulting Team

- Study Methodology and Consultation Process
- Tourism Market Analysis
  - Demographics
  - Trends and Market Potential
- Tourism Opportunity Identification
  - Purpose
  - Analysis
- Tourism Opportunity Identification – SWOT Analysis
  - Summary
  - North Slave
  - South Slave
  - Deh Cho
  - Inuvik
  - Sahtu
  - Aboriginal
- Gap Analysis
  - Product Development
  - Aboriginal Tourism Product
  - Human Resources
  - Infrastructures
  - Marketing
- Recommendations
  - Territory-Wide Tourism Development Strategy for the NWT
  - Product Development Strategy
  - Human Resources Development Strategy
  - Infrastructure Development Strategy
  - Marketing Strategy
- Summary
  - Observations
  - Recommendation

Study Methodology and Consultation Process

The research methods used in this project consisted of the following:

- Collecting existing inventories, documents, studies and plans - electronic databases were submitted from NWT Tourism and GNWT RWED

- Compiling a list of tourism operators from industry association memberships, magazines, internet search engines, chambers of commerce, municipal or regional tourism organizations, electronic yellow pages and brochures – noteworthy lists included NWTT's Explorer Guide and Hunting and Fishing Guide
- Merging information and inventories into a single database
- Developing a survey instrument
- Telephoning every tourism business in the Northwest Territories to administer the questionnaire
- Meeting with operators and government officials
- Hosting focus groups

The two main sources of obtaining current and up-to-date information were the telephone surveys and the focus groups. The telephone survey was 12 pages in length. It sought to obtain baseline information regarding a tourism operator's contact information, nature of business, months of operation, operating capacity, and price range. A research assistant made an estimated 2500 phone calls in an effort which showed due diligence to contact all tourism businesses operating in the Northwest Territories. Actual contact was made with only a fraction of those tourism businesses initially identified.

Focus groups were conducted in seven communities. Their purpose was to gain a better understanding of current tourism business and products, opportunities for improvement of existing businesses, opportunities for new tourism developments within the region and how to pursue this tourism development. It essentially sought to 'fill in the blanks' by responding to the voices and concerns of local operators and government officials. These focus groups were highly productive albeit slightly attended. There were 70 participants in total, many of whom were civil servants.

The tourism industry is highly fluid and dynamic. Operators come and operators go. Some close shop, some move on, some are bought out while others move in. Maintaining a current database is challenging at the best of times. The working list was comprised of the supplied databases, the guides' listing of operators as well as businesses gleaned from secondary research. Comparing the working list with the reality check offered by the telephone interviews and focus groups was an interesting experience.

The number of 'tourism' operators generated by the secondary research totalled 841. The final number was significantly less at 322. There are several reasons for

the difference and caution must be taken in interpreting this final figure. This deviation was due to multiple listings of the same tourism operator under different business names or different contact information, businesses that closed shop or businesses that were not really in the tourism industry. A screening or filtering process eliminated businesses when it became obvious that they did not belong in the tourism sector. Examples of businesses that appeared on the radar screen in the secondary research which were subsequently deleted included billiards halls and curling clubs. The calling process involved researching the correct telephone number, finding the right person with whom to speak, leaving messages and finally interviewing them.

It must be noted that the final figure of 322 tourism operators in the Northwest Territories represents those businesses who were individually contacted for the purpose of this study. There were obvious difficulties contacting many operators, particularly events coordinators.

A presentation was made by Jon Heshka at the NWTT Annual General Meeting in Yellowknife on November 4th and a focus group was later scheduled following the Conference on November 6th. Jon also met individually with numerous operators, economic development and tourism planning officers and government officials. Bridget Orsetti held focus groups and met with operators and officials in Inuvik, Tuktoyaktuk and Norman Wells on October 18-22. Gilles Valade held focus groups and meetings in Hay River, Fort Smith and Fort Simpson on December 6-10.

Tourism Market Demographics

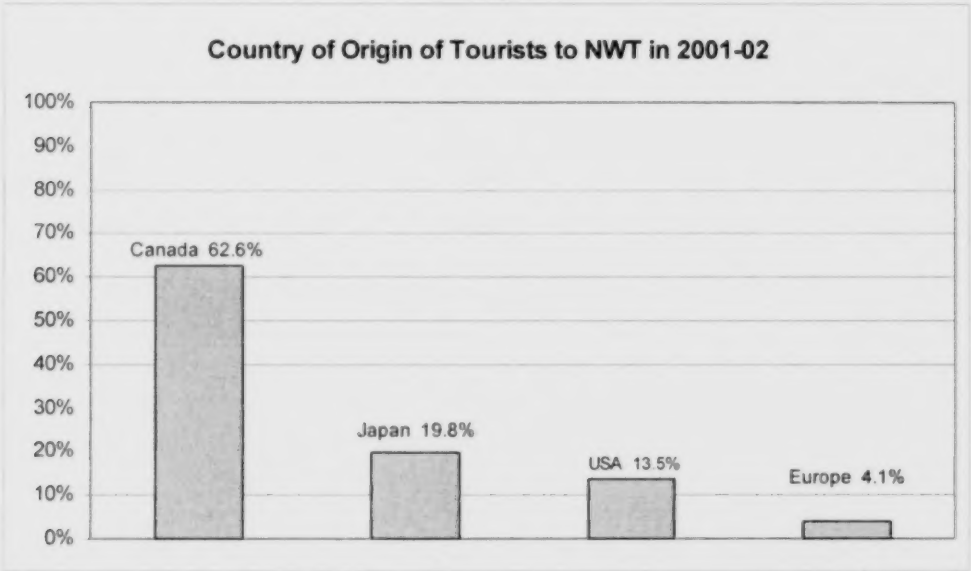
Any business must have a firm grasp of who constitutes its customer base. A business with a varied product selection will have an equally diverse customer base. Any business with limited resources obviously must seek the highest return on investment based on its product range and its market demographics. Based upon the business's own long-term self interest, a marketing strategy must be employed to prioritize its products and selectively target the market with a focused message.

This is the challenge of developing tourism product in the Northwest Territories and marketing it to the world. Tourism products vary from the subtle to the sublime, from wolf watching to hunting and fishing, from viewing the aurora

borealis to paddling the Nahanni and from diamond tours to cultural festivals. The range is so broad and diverse it should be evident that there will be an equally diverse range of tourists to the Northwest Territories. Blending or blurring their demographics into a clear and coherent marketing message is certainly a formidable task.

Some NWT tourism demographical generalities, however, can be observed. Nearly 2/3 of non-resident tourists were from Canada, 1/5 from Japan, 1/7 from the USA and 1/20 from Europe. A more detailed breakdown is illustrated in Table 1.

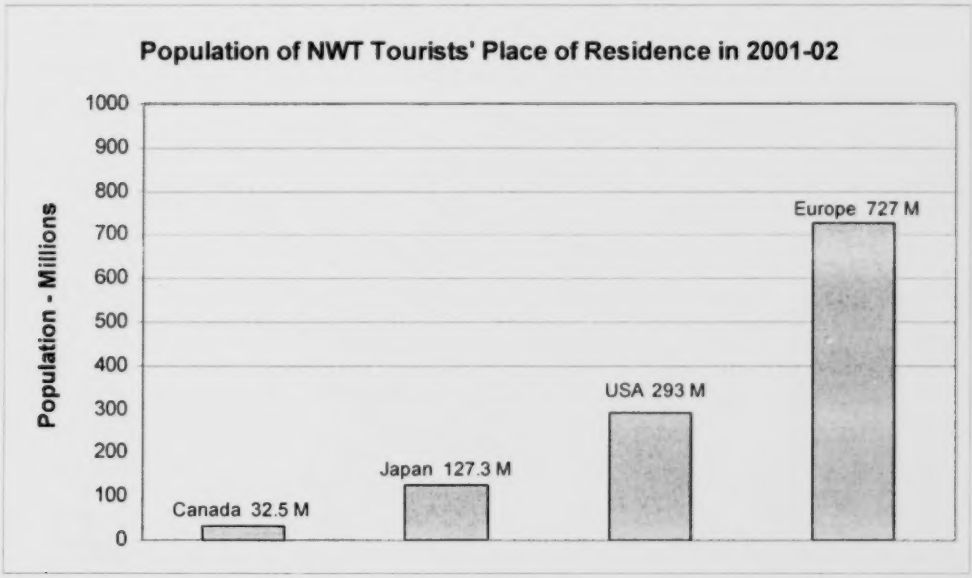
Table 1: Country of Origin of Tourists to the Northwest Territories in 2001-02



It is of interest that most Canadians were either from the closest provinces (Alberta or British Columbia) or the most populated – Ontario. It is also interesting that most Americans were from the Pacific Northwest (Washington and Alaska) and California. This should not be unexpected given their close proximity to the Northwest Territories. What is anomalous is that more Japanese travelled to the NWT than Americans despite having a country whose population is less than half that of the United States; this is explained by the allure of viewing the northern lights. Also curious is that despite a population of 727 million people, only 1350 Europeans visited the Northwest Territories.

The size of these markets is illustrated in Table 2.

Table 2: Population of NWT Tourists' Place of Residence in 2001-02



The number of leisure tourists visiting the NWT in 2003 totalled 38,040. Their distribution based upon area of residence has been shown above. The actual market size in Canada and the United States for the kinds of tourist products offered by the NWT is substantial and thus shows tremendous potential for growth.

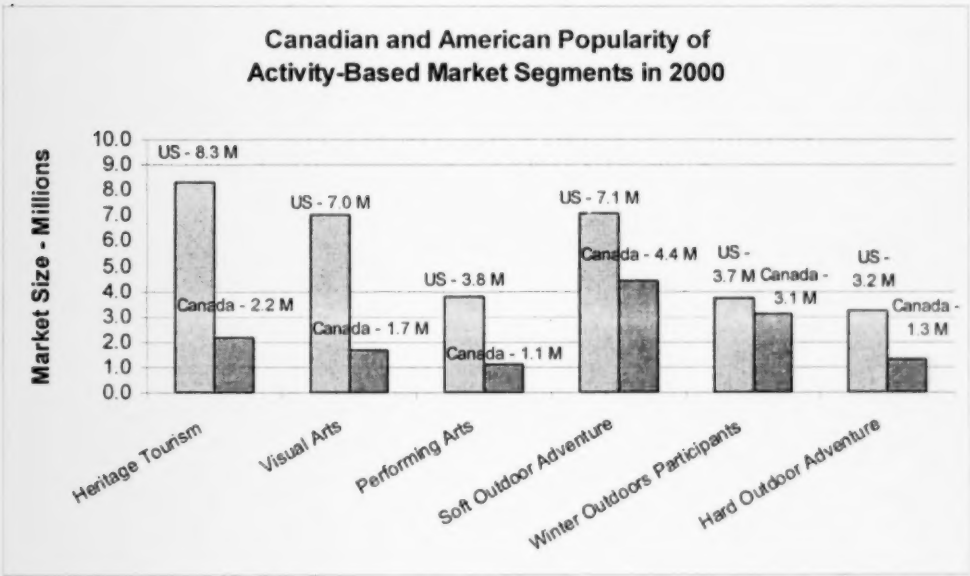
The largest activity-based market segment in the United States is heritage tourism enthusiasts totalling 8.3 million adults. The US's second largest activity-based market segment is for soft outdoor adventure (7.1 million adults). The visual arts enthusiast market is the third largest (7.0 American adults), winter outdoor participants (excluding alpine skiing) totals 3.7 million, the performing arts market segment equals 3.8 million American adults and the hard outdoor adventure segment totals 3.7 million US adults .

Soft outdoor adventure tourists were ranked #1 amongst Canadians (4.4 million adults). The second largest Canadian activity-based market segment is winter outdoor participants, excluding alpine skiing (3.1 million adults). Heritage tourism was the fourth biggest activity-based market segment in Canada

totalling 2.2 million adults. The visual arts enthusiast market (1.7 million), hard outdoor adventure (1.3 million) and performing arts market segments bring up the pack.

Table 3 summarizes the distribution and size of these activity-based market segments in Canada and the United States.

Table 3: Canadian and American Popularity of Activity-Based Market Segments in 2000



The gender breakdown, average age and income vary widely among activity-based market segments. The highlights are noted below.

		Canada	United States
Heritage Tourism	Females	50%	49%
	Males	50%	51%
	Average Age	45.1 years	48.9 years
	Annual Income	$60,000	$71,100 USD

Among Canadian heritage tourists:

- 50% are women and 50% are men
- the average age is 45.1 years

- the average income is $60,000

Among US heritage tourists:

- 49% are women and 51% are men
- the average age is 48.9 years
- the average income is $71,100 USD

		Canada	United States
Visual Arts Enthusiasts	Females	63%	53%
	Males	37%	47%
	Average Age	43.3 years	47.4 years
	Annual Income	$63,100	$72,500 USD

Among Canadian visual arts enthusiasts:

- 63% are women and 37% are men
- the average age is 43.3 years
- the average income is $63,100

Among US visual arts enthusiasts:

- 53% are women and 47% are men
- the average age is 47.4 years
- the average income is $72,500 USD

		Canada	United States
Soft Outdoor Adventure Enthusiasts	Females	50%	47%
	Males	50%	53%
	Average Age	39.2 years	44.1 years
	Annual Income	$58,200	$71,100 USD

Among Canadian soft outdoor adventure enthusiasts:

- 50% are women and 50% are men
- the average age is 39.2 years
- the average income is $58,200

Among US soft outdoor adventure enthusiasts:

- 47% are women and 53% are men
- the average age is 44.1 years

- the average income is $71,000 USD

		Canada	United States
Winter Outdoor Participants (excluding alpine skiing)	Females	44%	42%
	Males	56%	58%
	Average Age	40.2 years	43.5 years
	Annual Income	$55,800	$72,400 USD

Among Canadian winter outdoors participants (excluding alpine skiing):

- 44% are women and 56% are men
- the average age is 40.2 years
- the average income is $55,800

Among US winter outdoors participants (excluding alpine skiing):

- 42% are women and 58% are men
- the average age is 43.5 years
- the average income is $72,400 USD

These figures apply to tourists of these activity-based market segments travelling to Canada and not specifically to the Northwest Territories. It generally appears, however, that the target markets for these activity segments are middle-aged and moderately affluent.

Trends and Market Potential

Forecasting market trends is a complex art form that marries a memory of history, an attentiveness to the present and a sense of clairvoyance for the future. Any analysis and discussion on market trends must account for a wide range of seemingly unconnected factors. Trends will be affected by such external threats such as SARS or an appreciating dollar, evolving market niches like edu-tourism or experiential tourism and the attractiveness of bundling tourism products.

Market trends in tourism indicate that consumers are increasingly more interested in either diversifying the tourism products bought or even potentially bundling these products.

As an example, among Canada's 4.4 million soft outdoor adventure enthusiasts:

- 40% are also heritage tourists
- 38% of them are visual arts enthusiasts and
- 34% are also performing arts enthusiasts (these activity-based market segments were not designed to be mutually exclusive so the percentages do not add up to 100).

Among the United States of America's 7.1 million soft outdoor adventure enthusiasts:

- 35% are also heritage tourists
- 33% of them are visual arts enthusiasts and
- 35% are also performing arts enthusiasts

Further, among Canada's 2.2 million heritage tourists:

- 20% are soft outdoor adventure enthusiasts
- 25% are winter enthusiasts (other than alpine skiing)
- 53% are performing arts enthusiasts and
- 49% are visual arts enthusiasts

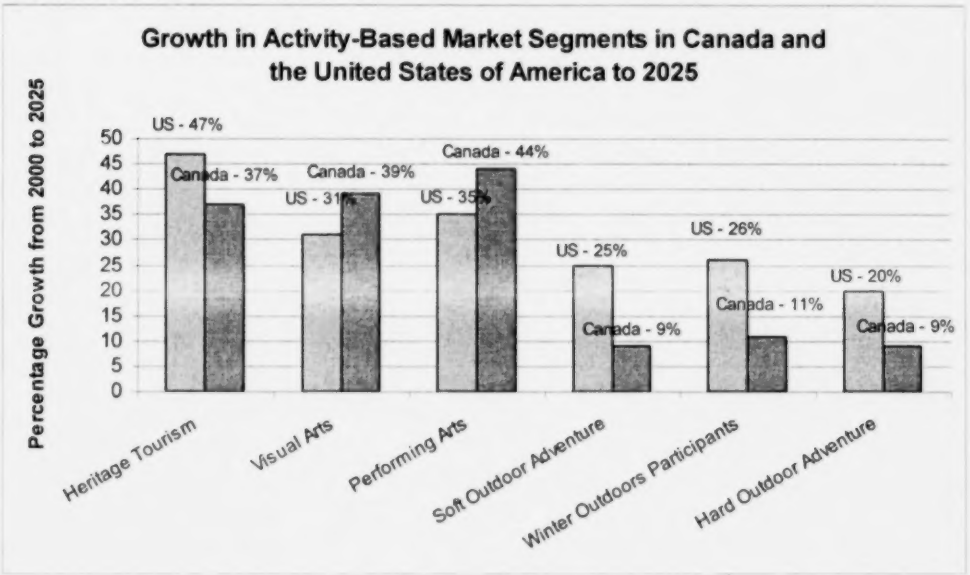
Among the US's 8.3 million heritage tourists:

- 41% are soft outdoor adventure enthusiasts
- 46% are winter enthusiasts (other than alpine skiing)
- 69% are performing arts enthusiasts and
- 63% are visual arts enthusiasts

The bottom line to this sharing of interests or common ground of tourism product is that the marketplace has become more sophisticated with a broader range in tastes. This translates to a market demanding greater products and a proposed marketplace that has main tourism product anchors that are interdependent with smaller, satellite tourism products. These ancillary products would cater to the modern tourist who wishes to blend their interests rather than the traditional tourist who was principally interested in only one thing. Product development and marketing campaigns must now account for the more multifaceted tourist that may be interested in, for example, diamond tours, canoeing and aboriginal culture.

Also, as the baby boomer bubble continues to burst and the average adult populations grow even older, the interests and tastes of these consumers will change. Table 4 summarizes the projected growth rates for heritage tourism, visual arts, performing arts, soft outdoor adventure and hard outdoor adventure activity-based market segments.

Table 4: Growth in Activity-Based Market Segments in Canada and the US from 2000-2025



Canada weathered tourism's 'perfect storm' of an appreciated dollar, SARS in Toronto, the forest fires in BC and mad cow disease in 2002-2003. These events demonstrated Canada's vulnerability (and perhaps invincibility) in the face of external threats. With renewed marketing and repackaged product, Canada's position on the world tourism stage has bounced back. International travel to Canada increased by 9.4% for the first eleven months of 2004 from the previous year to nearly 18.0 million trips. Over the last decade, the peak level during this time frame occurred in 2002 when 18.9 million international travellers came to Canada.

No country's tourism industry is impervious to these kinds of external hazards. Marketing Destination Organizations must be responsive to changes in the marketplace. The ante is upped when changes to the marketplace are so sweeping that it demands an equivalent level of response. It has been said that successful companies of the 21st century must be fit, fast, focussed and flexible to keep up with the pace of change and even to stay ahead of the curve. This is the challenge for Northwest Territories Tourism.

The edu-tourism or educational traveller is a new demographic that seeks and is willing to pay for authentic, high-quality learning vacations that are expertly led.

The Elderhostel phenomenon has shown that there is a market for edu-tourists who venture off the beaten track to learn about different cultures, histories and peoples.

The development of tourism packages that combine the unique features of learning, leisure, travel, adventure and cultural immersion into a single experience defines edu-tourism. Edu-tourists demand quality, experiential, authentic and low-pressure activities that are unique or exotic. The expectations of experiential or edu-tourists are high – they want quality throughout the tourism experience (guiding, hospitality, accommodation, transportation, etc) and are willing to pay for it. Price point is not the driving factor behind the purchase of these types of products.

The Northwest Territories clearly has the assets that would act as a draw for the burgeoning edu-tourist market. These include viewing the aurora borealis or migration of the Porcupine caribou herd, studying wolves or wolverines, or learning and experiencing Dene or Inuvialuit art and culture. The challenge is clearly to develop the infrastructure, tourism product and human resource skills that would satisfy the tastes of the discriminating edu-tourist.

Consumers now favor consuming experiences over traditional goods and services. They prefer active, authentic and participatory experiences which they can have a hand in structuring. This demographic defines the leading edge of vacation travel that is exotic, adventuresome, educational, experiential, authentic, altruistic, or spiritual. They are aggressive consumers of the arts and culture and are prepared to pay for it.

In sum, tourists come in all shapes and sizes. The Northwest Territories possess assets that are a natural fit with heritage tourists, soft outdoor adventure enthusiasts and the burgeoning niche target markets of edu-tourists and experiential tourists. These markets have the time and disposable income to come to the NWT if their high quality product expectations are met.

Summary of tourism trends

Tourism trends suggest that Ecotourism, adventure and cultural tourism product segments will continue to experience growth, especially in light of the growing interest in environmental sustainability, authenticity, education and learning experiences, as well as the increasing age of the adult population. The trend

towards soft adventure and ecotourism products is also strengthening because of ecotourism's increasing awareness/profile and appeal to a broader market segment. Travelers are paying more attention to tourism products and services and the effect they may have, not only on the environment but also cultures and local communities.

Ecotourism

The potential size of the market is enormous especially in North America. NWT has many resources necessary to provide a high quality ecotourism experience. Ecotourism travelers are most interested in wildlife viewing, hiking and trekking, rafting/ canoeing/kayaking, followed by casual walking.

Adventure Travel

One half of the US adult population is classified as adventure travelers. A high proportion of these adventure travelers are located in the West and Mid-West of the US, within easy reach of the NWT. Most popular activities are the same as ecotourism but can include "hard adventure" activities like rock/mountain climbing, mountain biking and backpacking.

Cultural Tourism

One third of Americans took a historic or cultural trip in the last year. Aboriginal cultural tourism products are in demand in the marketplace, including significant interest in the Asia/pacific marketplace. Historic/cultural travelers are generally older, well educated and from the middle to higher income groups.

Winter Products

Snowmobiling, dog sledding, snow shoeing, cross-country skiing, ice fishing and Northern Lights viewing appear to be the promising winter products for Aboriginal operators in the NWT.

Accommodation trends/quality expectations

Mid-range accommodation quality is the most preferred by adventure travelers and ecotourists. There is an increasing interest and focus towards greener accommodations, while still maintaining a high level of amenity and customer service.

Packaging and marketing trends

Travelers are looking for a variety of experiences and packaging is an ideal method of catering to this demand. Operators must be prepared to offer a variety of rate structures and be flexible in their arrangements.

Tourism Opportunity Identification - Purpose

The survey was conducted to update the inventory of active tourism businesses in the Northwest Territories. The inventory included business names, addresses and contact information. Each business was categorized into one of the eight tourism sectors:

1. Accommodation
2. Food and Beverage
3. Transportation
4. Attractions
5. Adventure and Recreation
6. Events and Conferences
7. Travel Trade
8. Tourism Services

Furthermore, business owners or representatives were asked to provide information on the size of their business (i.e. the number of guests they could accommodate), the rates charged for service, months of the year of operation, and places where they operate.

The inventory is useful for several reasons. As it describes the various tourism sector's size, scope, and operational features (capacity, service rates, season of operation, location), it lays the foundation for strategic planning and product development. It also enables communication to and within the tourism sector for those who have access to the list.

The 8 sectors of tourism are defined as follows:

1. Accommodation
The accommodation sector includes hotels, resort hotels, motels, bed and breakfasts, farm/ranch vacation sites, cabins, lodges, cottages, houseboats, campgrounds and hostels.

2. Food and Beverage
The food and beverage sector encompasses all types of establishments supplying food and beverages for consumption from fine dining and ethnic restaurants to institutional food outlets, specialty cafes and catering firms, from pubs and bars to nightclubs and lounges.

3. Transportation
Transportation is defined as the movement of people. The transportation sector includes transportation by air, rail, water and ground and includes private

vehicles, motor coach travel, taxicab operations and vehicle rental companies. Water based transport businesses include ferry companies, marinas, cruise lines, water taxis and other forms of water transportation.

4. Attractions

Attractions include historic sites, heritage homes, museums, halls of fame, art galleries, botanical gardens, aquariums, zoos, water parks, amusement parks, casinos and cultural attractions. Attractions also include natural features such as hot springs, northern lights, large mammals as well as territorial and national parks.

5. Adventure Tourism and Recreation

Adventure tourism and recreation includes everything from bird watching to mountain climbing. Adventure and recreation includes activities such as hiking, cycling, mountaineering, canoeing, kayaking, swimming, sailing, windsurfing, water-skiing, canoeing, and jet-skiing, horseback riding, river rafting, scuba diving, skiing, sky diving, snowmobiling, nature/wildlife viewing, fishing, hunting and a variety of other activities. Adventure tourism and recreation also include ski hills, golf courses and tennis resorts.

6. Events and Conferences

Events include festivals, sports events, and festivities ranging from family reunions to the Olympics. Conferences include conferences, meetings, trade shows and conventions.

7. Travel Trade

The travel trade is the sector that provides bookings and sales in other sectors. These bookings can be in the form of an all-encompassing tour package or a single booking for a single traveler. The travel sector is divided into retail and wholesale. Retail includes services to travelers such as ravel agencies. Wholesale includes services such as tour operators, who sell to travel agencies.

8. Tourism Services

The tourism services sector is comprised of the organizations, associations, government agencies, industry associations and companies that specialize in serving the needs of the tourism industry as a whole rather than the needs of travelers specifically. Those working in tourism services include people who research tourism trends, advertise and market tourism products, educate or inform others about tourism, and those who distribute general tourism

information. Retail businesses that benefit from tourism and travel also fall into this sector.

NWT Survey Results

Three hundred and twenty-two (322) surveys were completed. The following is a summary of responses to date. The report begins with a table showing the distribution of businesses surveyed by tourism sector. This is followed by information for each sector from Accommodation to Tourism Services as noted in Table 5.

Purpose

The survey was conducted to update the inventory of active tourism businesses in the Northwest Territories. The inventory included business names, addresses and contact information. Each business was categorized into one of the eight tourism sectors --- 1) Accommodation, 2) Food and Beverage, 3) Transportation, 4) Attractions, 5) Adventure and Recreation, 6) Events and Conferences, 7) Travel Trade, and 8) Tourism Services. Furthermore, business owners or representatives were asked to provide information on the size of their business (i.e. the # of guests they could accommodate), the rates they charge for service, the months they operate, and places where they operate. The inventory is useful for several reasons. It enables the following:

1. communication to and within the tourism sector for those who have access to the list.
2. description of the tourism sector by size, scope, and operational features (capacity, service rates, season of operation, location).
3. planning for future tourism business given the current description and knowledge of market interests in tourism products and services.

Method

The survey was administered by phone during November 2004 through January 2005. Tourism-related businesses were identified using an existing database acquired from Northwest Territories Arctic Tourism, searching the internet, and telephone directories. Phone interviews took an average of 15 minutes per call (but ranged form 5 to 30 minutes), and were conducted by one interviewer who introduced himself to the respondent, identified the purpose of the survey and proceeded to complete the questionnaire.

Results

Three hundred and twenty-two (322) respondents were successfully contacted. Data collection was more challenging than expected due to difficulties contacting operators, possibly due to the time of year. Those who did respond confirmed contact information (name, address, etc.), indicated the sector they represented---Accommodation, Food & Beverage, Transportation, Attractions, Adventure/Recreation, Events, Travel Trade, or Tourism Services---and pertinent information relative to their operation. Information such as the type of accommodation, type of adventure/recreation product, type of service, and season of operation was most often provided by the respondent. However, more specific details related to capacity and rates were often difficult to acquire given this was not always readily available to the respondent during the telephone interview. The following is a summary of responses to date. The report begins with a table showing the distribution of businesses surveyed by tourism sector. This is followed by information for each sector from Accommodation to Tourism Services as noted in Table 1.

Tourism Business by Sector

Each business was categorized into one of the '8 sectors of tourism'. While businesses might fit into more than one sector, the figures in Table 1 represent the primary sector each business. Therefore, 52% of the businesses contacted were primarily accommodation or Adventure/Recreation businesses.

Table 5: Tourism Businesses by Tourism Sector

Tourism Sector	Number	Percentage (%)
1) Accommodation	83	26
2) Food and Beverage	35	11
3) Transportation	50	15
4) Attractions	35	11
5) Adventure/Recreation	85	26
6) Events/Conferences	12	4
7) Travel Trade	15	5
8) Tourism Services	7	2
Total	322	100

One of the survey questions requested information on Aboriginal ownership. Table 2 shows that 113 businesses (35%) declared aboriginal ownership of some kind. Not all 113 indicated the type of aboriginal ownership, but for those that

did there was almost an equal split between individual Aboriginal owned and Aboriginal/non-Aboriginal partnership.

Table 6: Aboriginal and Non-Aboriginal Ownership

Type of Ownership	Number	Percentage %
Non-Aboriginal Ownership	171	53
Aboriginal Ownership	113	35
No response	38	12
Total	322	100
Aboriginal ownership type		
Individual Aboriginal ownership	43	38
Aboriginal co-operative	2	2
Aboriginal/non-aboriginal partnership	39	35
No response	29	25
Total	113	100

Accommodation

Eighty-three (83) businesses indicated that accommodation was their primary business and another 9 indicated accommodation was secondary to their business. These nine declared Adventure/Recreation as their primary business.

Table 7: Distribution by Type of Accommodation

Accommodation Type	Number	Percentage (%)
B&B	31	34
Motel	12	13
Hotel	15	16
Inn	8	9
Lodge	14	15
Cabins/cottages	12	13
Total	92	100

The accommodation businesses are listed below, grouped by accommodation type. Information for each business includes the location, number of rooms and number of guests each can support.

The B&Bs that reported location information are organized in Table 8 below. Almost half (12) were in Yellowknife. Overall they range from 1 to 14 rooms with average of 4 rooms per business. The number of guests they are able to accommodate ranged from 2 to 42 with an average of 8 guests per business.

Table 8: B&B Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
132	Bessie's Boarding House	Aklavik	NT	7	11	150
238	Colville Lake B&B	Colville Lake	NT	3	6	245
107	Homesteaders B&B	Fort Good Hope	NT	7	14	100
175	Little Dipper B&B	Fort Good Hope	NT	3	4	140
185	Tucho B&B	Fort Resolution	NT	5	12	125
196	Lucy's B&B	Fort Simpson	NT	2	4	100
322	Janor Guest House	Fort Simpson	NT	3	6	
111	The Anchorage	Hay River	NT	10	20	65
112	Harbour House	Hay River	NT	7	16	65
15	Arctic Chalet Ltd.	Inuvik	NT			
40	Robertson's B & B	Inuvik	NT	2		
68	Polar B&B	Inuvik	NT	4	10	95
140	Caribou Corner B&B	Norman Wells	NT	2	4	130
250	Sah Naji Kwe Spa & Meeting Place	Rae	NT	14	42	92
180	Kuptana's Guest House	Sachs Harbour	NT	5	12	220
304	Blueberry B&B	Tulita	NT	3	5	165
316	Lakeview B&B	Wha Ti	NT	7	8	125
48	Waterfront B&B	Yellowknife	NT	1	2	85
62	Ptartan Ptarmigan B&B	Yellowknife	NT	3	6	65
154	Eva & Eric's Bed & Breakfast	Yellowknife	NT	4	10	70
174	Lower's Landing	Yellowknife	NT	2	4	65
197	Island B&B	Yellowknife	NT	3	7	70
202	Arden Avenue B&B	Yellowknife	NT	3	8	70
228	Back Bay Boat B&B	Yellowknife	NT	3	6	70
235	Captain Ron's Bed & Breakfast	Yellowknife	NT	4		85
290	Gill- Power B&B	Yellowknife	NT			
298	Bayside B&B	Yellowknife	NT	4	10	
303	Blue Raven B&B	Yellowknife	NT	3	6	65
311	Embelton House	Yellowknife	NT	7	10	70

Total 29

Twelve businesses categorized themselves as motels. Overall they ranged from 3 to 30 rooms with an average of 15 rooms per business. The number of guests they were able to accommodate ranged from 6 to 112 with an average of 35 guests per business.

Table 9: Motel Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
177	Liard Valley General Store & Motel	Fort Liard	NT	12	40	95
300	Big River Motel	Fort Providence	NT	12	24	75
165	Nahanni Inn	Fort Simpson	NT	30	60	125
166	Maroda Motel	Fort Simpson	NT	16	32	125
49	W&L Emporium Ltd.	Fort Simpson	NT	8	8	90
162	The Migrator Motel	Hay River	NT	22	44	80
234	Cedar Rest Motel	Hay River	NT	9	10	85
242	Caribou Motor Inn (& Restaurant)	Hay River	NT	28	112	
15	Arctic Chalet Ltd.	Inuvik	NT	11	40	
27	Gameti Motel	Rae Lakes	NT	8	20	214
54	Trout Lake Lodge/Transient Centre	Trout Lake	NT	3	6	135
188	Northern Lites Motel	Yellowknife	NT	26	47	90

Total 12

Fifteen businesses were categorized as hotels, the majority of which are in Yellowknife.

Table 10: Hotel Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
47	Ramparts Hotel	Fort Good Hope	NT	6	10	180
276	Arctic Char Inn	Holman	NT	8	16	185
309	Mackenzie Hotel	Inuvik	NT			159
318	Finto Lodge	Inuvik	NT			159
155	Eskimo Inn	Inuvik	NT	72	144	139
168	Mackenzie Valley Hotel	Norman Wells	NT	50	100	150
4	Paulatuk Visitor Centre Hotel	Paulatuk	NT	8		229
139	Two Rivers Hotel	Tulita	NT	8	12	160
10	The Yellowknife Inn	Yellowknife	NT	129	175	99
59	Super 8 Motel	Yellowknife	NT	66	124	154
119	The Explorer Hotel	Yellowknife	NT	128	260	135
244	Capital Suites Yellowknife	Yellowknife	NT	78	234	89
282	Fraser Tower Suite Hotel	Yellowknife	NT	58	116	115
315	Discovery Inn	Yellowknife	NT	40	64	90
142	Chateau Nova	Yellowknife	NT	60	195	135

Total 15

Eight businesses were categorized as Inns and shown in Table 11 below.

Table 11: Inn Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
51	Twin Falls Inn	Enterprise	NT	10	20	85
32	Snowshoe Inn (NWT) LTd.	Fort Providence	NT	35	70	115
99	South Nahanni Inn	Fort Simpson	NT	4	8	90
22	Pelican Rapids Inn	Fort Smith	NT	31	55	125
66	Homesteaders Inn	Hay River	NT	23	46	80.25
101	Ptarimgan Inn	Hay River	NT	43	70	100
45	Rayuka Inn	Norman Wells	NT	10	20	125
200	Hotel Tuk Inn Ltd.	Tuktoyaktuk	NT	14	26	145

Total 8

Twelve lodges provided information.

Table 12: Lodge Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
239	Colville Lake Lodge	Colville Lake	NT	5	22	.
287	Grey Goose Lodge	Deline	NT	12	26	145
302	Aurora Nights Lodge	Fort Resolution	NT	.	16	.
306	Det'an Cho Tourist Camp	Fort Resolution	NT	6	24	.
	Lady Grey Lake Outfitters	Fort Smith	NT	1	8	
21	Mountain Aven Enterprises	Hay River	NT	6	.	.
	Hearne Lake Lodge	Leslieville	NT	8		
	Bekere Lake Lodge & Outfitters	Paulatuk	NT	4	10	
126	Drum Lake Lodge	Tulita	NT	3	18	.
123	Dechi Laoti First Nation	Wekweti	NT	10	30	250
179	Treeline Lodge	Yellowknife	NT	22	34	220
301	Blachford Lake Lodge	Yellowknife	NT	10	35	.

Total 12

Sixteen businesses had cabins or cottages. Many of these have locations outside of the Northwest Territory and further investigation is required to assess the nature of their operations in the Territory.

Table 13: Cabins/Cottages Accommodation

ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
239	Colville Lake Lodge	Colville Lake	NT	5	.	.
100	Lac La Martre Lodge	East Troy	WI	7	16	.
149	Frontier Fishing Lodge	Edmonton	AB	.	.	.
176	Lindberg Landing	Fort Simpson	NT	.	14	80

215	Alcantara Outfitting	Fort Smith	NT	5	15	130
265	Aylmer Lake Lodge	Halfmoon Bay	BC	4	16	
21	Mountain Aven Enterprises	Hay River	NT	4		
131	Deegahani Lake Camp	Hay River	NT	2		250
258	Brabant Lodge	Hay River	NT			
190	Jean Marie River Transient Centre	Jean Marie River	NT	1	4	100
186	Kasha Lake Lodge	Parksville	BC	17	36	145
250	Sah Naji Kwe Spa & Meeting Place	Rae	NT	10	35	92
147	Gana River Outfitters Ltd.	Rimbey	AB	4	10	
141	Canadian Wild Wilderness Outfitter	Woodbridge	ON	2	8	
295	Peterson's Point Lake Lodge	Yellowknife	NT	5	12	
312	Enodah Wilderness Travel Ltd.	Yellowknife	NT	12		

Total 16

The above tables provide an overview of the accommodation sector that was part of the survey. It is yet to be determined what proportion of the accommodation sector this represents, or how accurately this represents the diversity of the accommodation sector overall in NWT. It is a substantial improvement from the list received at the beginning of the study, which was considerably out of date. It now provides an excellent base for the new database on tourism business in the region.

Food and Beverage

Thirty-five businesses were categorized primarily as food/beverage type businesses, and an additional 5 noted food and beverage as secondary. Most provided service throughout the day and were open year round. Guest capacity is noted for each in the table below where the businesses are sorted by location. Most businesses who responded were in Yellowknife, and guest capacity ranged from 20 to 271 with the average seating capacity of 85 people. Several businesses did not provide seating capacity information.

Table 14: Food and Beverage Businesses

Name	Location	Guest Capacity
Grey Goose Lodge	Deline	32
Big River Motel	Fort Providence	47
Snowshoe Inn (NWT) LTd.	Fort Providence	120
W&L Emporium Ltd.	Fort Simpson	24
Pelican Rapids Inn	Fort Smith	
Back Eddy Dining Lounge	Hay River	120
Boardroom Restaurant	Hay River	80
Ptarimgan Inn	Hay River	120

Arctic Char Inn	Holman	45
Brass Rail Lounge	Inuvik	72
Cariboo Café	Inuvik	84
Eskimo Inn	Inuvik	60
The Cabin Lounge	Inuvik	60
The Peppermill Restaurant	Inuvik	52
The Roost	Inuvik	
To-Go's	Inuvik	30
A&W Restaurant	Yellowknife	75
Barkley's Restaurant	Yellowknife	170
Bayside B&B	Yellowknife	
Boston Pizza	Yellowknife	271
Bruno's Pizza	Yellowknife	20
Canadian Pizza	Yellowknife	
Dominos Pizza	Yellowknife	
Gold Range Hotel	Yellowknife	
Hot Shots	Yellowknife	103
Jade Garden & YK Pizza	Yellowknife	60
L'Attitudes Restaurant & Bistro	Yellowknife	122
Le Frolic Bistro Bar	Yellowknife	67
Leisure Café	Yellowknife	150
L'Heritage Restaurant Francais	Yellowknife	35
Main Street Donair & Falafel	Yellowknife	22
McDonalds	Yellowknife	
Old Town Landing	Yellowknife	100
Our Place Family Dining Room	Yellowknife	78
Pan Asia	Yellowknife	51
Pizza Hut	Yellowknife	130
Subway	Yellowknife	50
The Black Knight Pub	Yellowknife	235
The Millwright	Yellowknife	66
Tim Horton's	Yellowknife	56

Total 40

Transportation

Fifty businesses from the Transportation Sector responded to the survey. There were 10 cab companies, 9 auto/truck rental companies, 9 scheduled service/charter companies, and 21 charter companies. Almost all operate year round.

Table 15: Transportation by Type of Service

	ID	Company	Location	P/T	Rental	Transport
Taxi	208	Arctic Executive Limousines	Yellowknife	NT	Car/truck	.
	252	C&A Holdings Taxi	Fort Providence	NT	.	.
	218	B&L Taxi	Fort Simpson	NT	.	.
	259	Border Cabs	Fort Smith	NT	.	.
	56	Town Cab	Inuvik	NT	Car/truck	.
	52	Joanne's Taxi	Tuktoyaktuk	NT	.	.
	216	AC Taxi	Wha Ti	NT	.	.
	81	Nunasi Helicopters	Yellowknife	NT	.	.
	240	City Cab Ltd.	Yellowknife	NT	.	.
	310	Diamond Cabs	Yellowknife	NT	.	.
Rentals	26	K&K Expediting	Fort Simpson	NT	Car/truck	.
	203	Avis Rentals	Fort Smith	NT	Car/truck	.
	55	Trav-Car Holdings Inc	Norman Wells	NT	Car/truck	.
	92	Norman Wells Transportation Ltd.	Norman Wells	NT	Car/truck	.
	34	Ted's U-Drive Ltd.	Yellowknife	NT	Car/truck	.
	41	Royal Rent-a-Car/Rent-a-Relic Truck	Yellowknife	NT	Car/truck	.
	57	National Car & Truck Rentals	Yellowknife	NT	Car/truck	.
	105	Hertz Car Rental	Yellowknife	NT	Car/truck	.
	256	Budget Car & Truck Rental	Yellowknife	NT	Car/truck	.
Scheduled/	283	First Air	Carp	ON	.	Plane
Charter	113	Greyhound Canada Transportation Corp.	Edmonton	AB	.	Bus
	88	Northwestern Air Lease Ltd.	Fort Smith	NT	.	Plane
	255	Buffalo Airways	Hay River	NT	.	Plane & Float
	206	Aklak Air	Inuvik	NT	.	Plane
	275	Northright Airways	Norman Wells	NT	.	Plane & Float
	223	Air North, Yukon's Airline	Whitehorse	YK	.	Plane
	211	Air Tindi	Yellowknife	NT	.	Plane & Float
	106	Canadian North	Yellowknife	NT	.	Plane & Float
Charter	241	Carson Tours Ltd.		AB	.	Bus
	289	FES Greenlands Bus & Taxi	Aklavik	NT	Car/truck	Bus
	294	North Cariboo Air - Fort Liard	Fort Liard	NT	.	Plane
	11	Wolverine Air Ltd.	Fort Simpson	NT	.	Plane & Float
	96	Simpson Air (1981) Ltd.	Fort Simpson	NT	.	Plane & Float
	247	Canadian Helicopters	Fort Simpson	NT	.	Helicopter
	173	Reliance Airways Ltd.	Fort Smith	NT	.	Plane & Float
	207	Arctic Excursions Ltd.	Fort Smith	NT	.	Plane & Float
	220	Big River Air	Fort Smith	NT	.	Plane & Float
	42	Remote Helicopters Ltd	Hay River	NT	.	Helicopter
	150	Frontier Coachlines NWT	Hay River	NT	.	Bus
	317	Landa Aviation	Hay River	NT	.	Plane
	23	MGM Services	Inuvik	NT	.	Bus
	268	BeauDel Air	Inuvik	NT	.	Plane & Float
	89	North-Wright Airways Ltd.	Norman Wells	NT	.	Plane & Float

9	Rae Edzo Friendship Express	Rae	NT	.	.
36	Ursus Aviation	Tulita	NT	.	Plane & Float
217	Alkan Air Ltd.	Whitehorse	YK	.	Plane
115	Great Slave Helicopters	Yellowknife	NT	.	Helicopter
272	Arctic Sunwest Charters	Yellowknife	NT	.	Plane & Float
212	Adlair Aviation	Yellowknife	NT	.	Plane

Total 50

Attractions

Eight Museum/Cultural type attractions and 25 Craft Shop/gallery type attractions responded in addition to Aulavik National Park and two unclassified types of businesses. All were open year round except the National Park (June-August) and Old Town Float Base in Yellowknife (May-September).

Table 16: Attractions/Shops by Attraction Type

Attraction	ID	Company	Location	P/T
Museum	151	Fort Smith Northern Life Museum	Fort Smith	NT
	145	Norman Wells Historical Centre	Norman Wells	NT
	61	Prince Of Wales Nothern Heritage Centre	Yellowknife	NT
	189	John A's Paleo Emporium	Yellowknife	NT
National Park		Aulavik National Park of Canada	Sachs Harbour	
		Nahanni National Park Reserve*		
		Tuktut Nogait National Park*		
		Wood Buffalo National Park of Canada*		
Territorial Park		Blackstone Territorial Park*		
		Cabin Creek (Ehjuu Njik) Territorial Park*		
		Cameron Falls Trail Territorial Park*		
		Cameron River Crossing Territorial Park*		
		Campbell Creek (Nihtak) Territorial Park*		
		Canol Heritage Trail Territorial Park*		
		Caribou Creek (Vadzaih) Territorial Park*		
		Chan Lake Territorial Park*		
		Dory Point Territorial Park*		
		Ehjuu Njik Territorial Park*		
		Fort Providence Territorial Park*		
		Fort Simpson Territorial Park*		
		Fort Smith Mission Historic Park*		
		Fred Henne Territorial Park*		
		Gwich'in Territorial Park*		
		Happy Valley Territorial Park*		
		Hay River Territorial Park*		
		Hidden Lake Territorial Park*		
		Jak Territorial Park*		
		Kakisa River Day Use Area*		
		Lady Evelyn Falls Territorial Park*		
		Liard River Crossing Territorial Park*		
		Little Buffalo River Crossing Territorial Park*		

		Little Buffalo River Falls Day Use Area*		
		Madeline Lake Day Use Area*		
		McKinnon Territorial Park*		
		McNallie Creek Picnic Area*		
		Nihtak Day Use Area*		
		Nitainlaii Territorial Park*		
		North Arm Territorial Park*		
		Northwest Territories/Yukon Border Day Use Area*		
		Pontoon Lake Day Use Area*		
		Powder Point Territorial Park*		
		Prelude Lake Territorial Park*		
		Prosperous Lake Day Use Area*		
		Queen Elizabeth Territorial Park*		
		Reid Lake Territorial Park*		
		Sambaa Deh Falls Territorial Park*		
		Sixtieth Parallel Territorial Park*		
		Tetlit Gwinjik Territorial Park*		
		Twin Falls Gorge Territorial Park*		
		Vadzaih Campground Gwich'in Territorial Park*		
Cultural Attraction	83	Northern Transportation Company Ltd.	Hay River	NT
	78	Old Town Float Base	Yellowknife	NT
	205	Artico Biota Studio	Yellowknife	NT
Craft Shop/Gallery	12	Winnie's Dene Art Gallery & Gift Shop	Enterprise	NT
	152	Acho Dene Native Crafts	Fort Liard	NT
	24	Lynx River Craft Shop	Fort Simpson	NT
	87	Northern Delights	Fort Smith	NT
	251	Cabin Fever	Hay River	NT
	280	Gold 'n' Gift	Hay River	NT
	75	Originals on Mackenzie	Inuvik	NT
	85	Northern Images (Inuvik)	Inuvik	NT
	297	DJ Sensations Gift Shop	Iqaluit	NT
	121	Creations	Norman Wells	NT
	30	Sasha's	Yellowknife	NT
	65	Polar Parkas	Yellowknife	NT
	84	Northern Transition	Yellowknife	NT
	86	Northern Images (Yellowknife)	Yellowknife	NT
	93	Nor-Art	Yellowknife	NT
	148	Gallery of the Midnight Sun	Yellowknife	NT
	156	Langlois	Yellowknife	NT
	191	Jan's Card & Gift	Yellowknife	NT
	192	Northern Souvenir & Gift Shop	Yellowknife	NT
	193	Jamorah Diamonds	Yellowknife	NT
	221	Birchwood Gallery Ltd.	Yellowknife	NT
	262	Aurora Gallery	Yellowknife	NT
	296	Dawn Oman	Yellowknife	NT

Total 35

* The information on these attractions was not obtained through the survey; they were added to the list by the consulting team. These attractions are therefore not part of the data analysis.

Adventure and Recreation

Eighty-five operations were categorized primarily as adventure/recreation type operations, and an additional 5 indicated that adventure/recreation was secondary to their business. These operations are organized below by the primary activity/experience they provide. The location was taken from the business address for the entries in Table 17 below. This provides insight into the presence of companies operating in NWT who are based outside the Territory. Twelve operations were classified as outfitters and indicated a variety of secondary products including hunting, fishing and viewing. There were 18 hunting operations, 32 fishing, 5 dog-sledding, 4 canoeing, 1 sea kayaking, 2 rafting, 4 nature viewing, 2 wildlife viewing, 4 aurora viewing and 4 cultural interpretation operations.

Given the nature of these businesses, different from the other sectors, they potentially operate in more than one region. Therefore, refer to the analysis by region in this report.

Table 17: Adventure/Recreation Businesses by Type

	ID	Company	Location	P/T	Second Product	Third Product
Outfitting	195	Shoreline Outfitting	Deline	NT	Fishing	.
	288	Great Bear Lake Outfitting	Deline	NT	Hunting	Fishing
	184	Tucho Tours	Fort Resolution	NT	Aurora Viewing	Cultural Interpretation
	114	Great Slave Tours	Hay River	NT	Aurora Viewing	Nature Viewing
	245	MSS Ltd.	Hay River	NT	.	.
	222	Blackfeather Wilderness Adventure Co.	Parry Sound	ON	Canoeing	.
	219	Bekere Lake Lodge & Outfitters	Paulatuk	NT	Hunting	.
	226	Banks Island Big Game Hunts	Sachs Harbour	NT	Hunting	.
	267	Banks Island Tundra Tours	Sachs Harbour	NT	Wildlife Viewing	.
	17	Noksana'a Big Game Guiding to Adventures	Tuktoyaktuk	NT	Hunting	.
	224	Arctic Red River Outfitters Ltd.	Whitehorse	YK	.	.
	201	Arctic Safaris	Yellowknife	NT	.	.
Hunting	80	NWT Outfitters Ltd.	Courtenay	BC	.	.
	169	Mackenzie Mountain Outfitters	Dawson Creek	BC	Fishing	.
	124	Deh Cho Wilderness Tours Ltd.	Fort Providence	NT	.	.
	264	Artillery Lake Adventures	Halfmoon Bay	BC	.	.
	64	Cariboo Pass Outfitters	Hamilton	MT	.	.
	97	Nahanni Butte Outfitters Ltd.	Hudson's Hope	NT	.	.
	16	Fred A. Webb & Sons	Maple Ridge	BC	Fishing	.
	73	Paulatuk Big Game Outfitting & Guiding Services	Paulatuk	NT	.	.
	43	Redstone Trophy Hunts	Pink Mountain	BC	.	.
	249	Camp Ekwo	Rae	NT	.	.
	147	Gana River Outfitters Ltd.	Rimbey	AB	.	.
	76	Pokiak Guiding & Outfitters	Tuktoyaktuk	NT	.	.
	102	Chuck Gruben's Guiding & Outfitting	Tuktoyaktuk	NT	Nature Viewing	Wildlife Viewing
	8	South Nahanni Outfitters Ltd.	Whitehorse	YK	.	.
	72	Peterson's Point Lake Lodge	Yellowknife	NT	Fishing	Nature Viewing
	134	Aurora Caribou Camp	Yellowknife	NT	.	.

	146	Grady Lake Camp	Yellowknife	NT	.	.
	270	Adventure Northwest Ltd.	Yellowknife	NT	Outfitting	.
Fishing	91	North of Sixty	Crystal	MN	.	.
	161	Modeste Outfitters	Deline	NT	.	.
	100	Lac La Martre Lodge	East Troy	WI	.	.
	149	Frontier Fishing Lodge	Edmonton	AB	.	.
	199	Hume River Enterprises	Fort Good Hope	NT	Wildlife Viewing	Cultural Interpretation
	204	Aurora River Tours and Rentals	Fort Providence	NT	Nature Viewing	.
	90	North Star Resort	Fort Smith	NT	.	.
	125	Donovan Lake Outfitters	Fort Smith	NT	.	.
	171	Lynx Tundra Lodge	Fort Smith	NT	Canoeing	.
	172	Andrew Lake Lodge & Camps	Fort Smith	NT	Hunting	.
	133	Lady Grey Lake Outfitters	Fort Smith	NT	.	.
	215	Alcantara Outfitting	Fort Smith	NT	.	.
	265	Aylmer Lake Lodge	Halfmoon Bay	BC	.	.
	20	Sandy Point Lodge	Hay River	NT	Cultural Interpretation	.
	131	Deegahani Lake Camp	Hay River	NT	.	.
	258	Brabant Lodge	Hay River	NT	.	.
	274	Arctic Hills Tour Co.	Holman	NT	Dogsledding	Wildlife Viewing
	6	Thuban Lake Lodge	Lacombe	AB	.	.
	108	Hearne Lake Lodge	Leslieville	AB	.	.
	53	Dubawnt Camps Ltd.	Nester Falls	ON	.	.
	186	Kasha Lake Lodge	Parksville	BC	.	.
	39	Rocky Bay Fishing Lodge	Pleasanton	CA	.	.
	2	Pilot Lake Cabins	Red Deer	AB	.	.
	37	Selwyn Lake Lodge	Saskatoon	SK	.	.
	58	Talston Lake Lodge	St. Albert	AB	.	.
	67	Plummers Arctic Lodges	Winnipeg	MB	.	.
	141	Canadian Wild Wilderness Outfitter	Woodbridge	ON	.	.
	19	Pilote Point Lodge	Yellowknife	NT	Hiking	Nature Viewing
	95	Namushka Lodge	Yellowknife	NT	.	.
	135	Bluefish Services	Yellowknife	NT	.	.

	291	Goldak's Camp	Yellowknife	NT	.	.
	320	[illegible] North Safaris Ltd.	Yellowknife	NT	Wildlife Viewing	Aurora Viewing
Dog-sledding	44	Red Baron Kennels	Fort Smith	NT	.	.
	278	Arctic Chalet Ltd.	Inuvik	NT	Outfitting	.
	129	Eetuk Outfitting & Equipment Rentals	Iqaluit	NU	Nature Viewing	Snowmobiling
	117	Becks Kennels	Yellowknife	NT	.	.
	314	Dog Paddle Adventures	Yellowknife	NT	Fishing	.
Canoeing	60	Sunrise Expeditions	Bangor	ME	.	.
	29	Nahanni Wilderness Adventures	Canmore	AB	Outfitting	
	137	Canoe Arctic Inc.	Fort Smith	NT	.	.
	275	Northright Airways	Norman Wells	NT	.	.
Sea Kayaking	14	Whitney & Smith Legendary Expeditions	Canmore	AB	.	.
Rafting	144	Chinook River Sports		AB	.	.
	160	Nahanni River Adventures Ltd.	Whitehorse	YK	Canoeing	.
Nature Viewing	281	Four Seasons Arctic Adventures	Aklavik	NT	Wildlife Viewing	Aurora Viewing
	181	Kuptana's Outfitting & Nature Tours	Sachs Harbour	NT	.	.
	122	Dechenla Lodge	Whitehorse	YT	Wildlife Viewing	Cultural Interpretation
	236	Cygnus Ecotours	Yellowknife	NT	.	.
Wildlife Viewing	271	Air Thelon Ltd.	Yellowknife	NT	Outfitting	Fishing
	313	Eagle-Eye Tours	Edmonton	NT	Bird Watching	.
Aurora Viewing	248	Canadian EX. Aurora Tours	Yellowknife	NT	.	.
	273	Aurora Village	Yellowknife	NT	Cultural Interpretation	.

	229	Arctic Tour Company Ltd.	Tuktoyaktuk	NT	Dogsledding	Snowmobiling
	266	Raven Tours	Yellowknife	NT	Dogsledding	.
Cultural Interpretation	77	Ookpik Tours & Adventures	Tuktoyaktuk	NT	.	.
	159	Midnight Express Tours	Inuvik	NT	.	.
	237	Dakota Island Cultural Camp	Fort Resolution	NT	.	.
	225	Bannockland B&B	Fort Simpson	NT	.	.
Other	63	North Arm Charters	Rae	NT	.	.
	82	NWT Marine Group	Edmonton	AB	.	.

Total 90

Events

Twelve event representatives responded to the survey. This appears very limited and likely not representative of significant events in NWT. There is likely a more effective way to capture an inventory of events beyond this survey.

Table 18: Events by Event Type

Type of Event	Name	Date	Location
Arts Festival	Great Northern Arts Festival	July	Inuvik
	Artist Workshop*		
	Far North Film Festival*		
	Festival of the Midnight Sun*		
	Great Northern Arts Festival*		
	Open Sky Festival*		
	TASSS' Summer Festival		
	Workshop Series*		
Community Event	Aklavik Dizzy Daze	Labour Day	Aklavik
	Celebration of Fall	Weekend	
	Wood Buffalo Frolics -Winter Carnival	March 18-20/05	Fort Smith
	Beluga Jamboree	April 15-18/05	Tuktoyuktuk
	Beavertail Jamboree		Fort Simpson
	Caribues Festival - Solstice, Carnival	June 20-24	
	Delta Daze	Thanksgiving	Inuvik
	Denioo Days	August	Fort Resolution
	Snow Sculpture Contest and Easter Egg Hunt*		Fort Resolution
	Fort Smith Fall Fair*		Fort Smith
	Kamba Winter Carnival*		Hay river
	Sunrise Festival*		Inuvik
	Black Bear Jamboree*		Norman Wells
	Spring Fling*		Norman Wells
	Spring Carnival*		Wha Ti
	Annual Mad Trapper's Ball*		Yellowknife
	Canada Day*		Yellowknife
	Caribou Carnival*		Yellowknife
	Funk Fest - Summer Solstice Festival*		Yellowknife
	Midnight Sun Float Plane Fly-In*		Yellowknife
	NWT Mining Week*		Yellowknife
	Raven Mad Daze*		Yellowknife
	Tourism Awareness Week*		Yellowknife
	Tree of Peace Annual Talent		

	Show*		Yellowknife
	Yellowknife Aurora Festival*		Yellowknife
	Yellowknife Pride Celebrations*		Yellowknife
Music Festival	Folk on the Rocks	July 15-17/05	Yellowknife
	Cariblues Festival*		
	Midway Lake Festival*		
	The End of the Road Music Festival*		
Sports Event	NMI Mobility Canadian Championship Dog Derby	March 25-27/05	Yellowknife
	Ice Worm Challenge		
	Back Bay Loppett	Apr 10/05	

Total 12

* The information on these events was not obtained through the survey; they were added to the list by the consulting team. These events are therefore not part of the data analysis.

Travel Trade

Fifteen businesses reported being part of travel trade business. These included 4 travel agencies, 4 wholesale tour operators, 5 tour operators, 1 booking agent and 1 publisher.

Table 19: Types of Travel Trade Business

Type of Travel Trade	Name	Location
Travel agency	Rapid Travel	Norman Wells
	Marlin Yellowknife Travel	Yellowknife
	Top of the World Travel and Tours	Yellowknife
	Nishi-Khon/Key West Travel	Yellowknife
Wholesale tour operator	Select Holidays	Innisfail AB
	Odyssey Learning Adventures	Kingston ON
	Aat Rainbow Tours	Roberts Creek
	Horizon Holidays	Toronto ON
Tour operator	Arctic Tour Company Ltd.	Tuktoyaktuk
	Raven Tours	Yellowknife
	Quark Expeditions	Darien
	Carson Tours Ltd.	
	Cardinal Travel Tours	Calgary AB

Booking Agent	Great Canadian Adventure Company	Edmonton AB
Publisher	Up Here Publishing	Yellowknife

Total 15

Tourism Services

Seven businesses reported being part of tourism services. They included 3 Information Centres, 3 Consultants, and 1 Government Agency. Excluding the Information Centres, they described their services as business development or marketing, and the marketing services included website development.

Table 20: Types of Tourism Business Services

Type of Service	Name	Location
Consultant	Outcrop Group	Yellowknife
	Bush Tea Resources	Yellowknife
	Kellett Communications Inc.	Yellowknife
Government Agency	NWT Metis Development Corporation Ltd.	Yellowknife
Information Centre	Fort Smith Visitor Information Centre	Fort Smith
	Acho Dene Native Crafts	Fort Liard
	Enterprise Info Centre (VIRC)	Enterprise
Destination Marketing	Northwest Territories Tourism*	Yellowknife
Government Economic Development	Resource, Wildlife and Economic Development (RWED) Regional Offices*	Yellowknife Fort Smith Fort Simpson Inuvik Normal Wells

Total 7

* The information on these business service organizations was not obtained through the survey; they were added to the list by the consulting team. These businesses are therefore not part of the data analysis.

Further Analyses

The above analysis provides the first look at tourism businesses organized by tourism sector. This provides insight into the scope of tourism businesses that are active in the NWT, and the diversity of current tourism products. In addition, information was gathered to estimate the size of businesses based on client capacity and the amounts charged for types of products. While all businesses

were not willing to share this information, several did, and it will be one step further in characterizing the tourism activity in the NWT today.

Regional Analysis

The table below provides figures showing the number of tourism businesses by sector operating within the five regions. It is important to keep in mind that some businesses did not provide information for where they operated, and that the figures represent numbers and percentages for those who responded to the survey, not all tourism businesses in the regions. The column labelled 'Total' shows the number of tourism businesses reporting the sector as the primary part of their business. Eighty-five businesses (26% of all businesses) reported adventure/recreation as the primary sector for their business.

The figures enable comparison within and across regions for each sector. For example, within the Sahtu region, 29 businesses reported operating in the region and 8 were primarily Adventure/Recreation businesses. Of the Adventure/Recreation businesses across the regions, 24 (28%) were operating in the North Slave region. The South Slave region was similar to the North Slave region with 21 businesses (25%) operating in the region, and the Inuvik with 12 (14%), Deh Cho with 7 (8%) and Sahtu with 8 (9%) adventure/recreation businesses respectively.

Table 21: Tourism Sector by Region

Tourism Sector	Total		North Slave		South Slave		Inuvik		Deh Cho		Sahtu	
	#	% of N	#	% sector	#	% sector	#	% sector	#	% sector	#	% sector
Accommodation	84	26	29	35	15	18	13	15	13	15	12	14
Food and Beverage	34	11	24	70	2	6	7	20	1	3	1	3
Transportation	50	16	19	38	13	26	8	16	8	16	5	10
Attractions	33	10	19	57	5	15	3	9	3	9	2	6
Adventure/Recreation	85	26	24	28	21	25	12	14	7	8	8	9
Events/Conferences	12	4	5	41	2	16	4	33	1	8	0	0
Travel Trade	15	5	7	46	1	3	4	27	0	0	1	3
Tourism Services	6	2	3	50	2	33	0	0	1	17	0	0
			130		61		51		34		29	

Total 322

The primary interest at this point is to examine potential gaps in the tourism products that would attract tourists. Therefore, the following analysis describes the adventure/recreation products reported operating in each region. This will subsequently be used in conjunction with the initial SWOT analysis to provide greater insight into potential business opportunities for each region.

North Slave

In the North Slave region 19 adventure/recreation businesses described their products. Eleven operated out of Yellowknife. Most were hunting and fishing operations. Other businesses included outfitting, dog-sledding, kayaking, nature, wildlife and aurora viewing. The season for all operations was between June and October except for aurora viewing which runs from December to April. Additional information was not provided for Arctic Safaris or North Arm Charters.

Table 22: North Slave Adventure/Recreation Operations

Primary Product	ID	Company	Location	P/T	Second Product	Third Product
Outfitting	201	Arctic Safaris	Yellowknife	NT		
Hunting	72	Peterson's Point Lake Lodge	Yellowknife	NT	Fishing	Nature Viewing
	134	Aurora Caribou Camp	Yellowknife	NT		
	146	Grady Lake Camp	Yellowknife	NT		
	249	Camp Ekwo	Rae	NT		
Fishing	6	Thuban Lake Lodge	Lacombe	AB		
	19	Pilote Point Lodge	Yellowknife	NT	Hiking	Nature Viewing
	58	Talston Lake Lodge	St. Albert	AB		
	95	Namushka Lodge	Yellowknife	NT		
	100	Lac La Martre Lodge	East Troy	WI		
	108	Hearne Lake Lodge	Leslieville	AB		
	135	Bluefish Services	Yellowknife	NT		
	172	Andrew Lake Lodge & Camps	Fort Smith	NT	Hunting	
Dog-sledding	117	Becks Kennels	Yellowknife	NT		
Sea Kayaking	14	Whitney & Smith Legendary Expeditions	Canmore	AB		
Nature Viewing	236	Cygnus Ecotours	Yellowknife	NT		
Wildlife Viewing	179	Treeline Lodge	Yellowknife	NT	Nature Viewing	
Aurora Viewing	248	Canadian EX. Aurora Tours	Yellowknife	NT		
Charter	63	North Arm Charters	Rae	NT		

Total 19

Table 23: North Slave Accommodations

	ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
B&B	48	Waterfront B&B	Yellowknife	NT	1	2	85
	62	Ptartan Ptarmigan B&B	Yellowknife	NT	3	6	65
	154	Eva & Eric's Bed & Breakfast	Yellowknife	NT	4	10	70
	174	Lower's Landing	Yellowknife	NT	2	4	65
	197	Island B&B	Yellowknife	NT	3	7	70
	202	Arden Avenue B&B	Yellowknife	NT	3	8	70
	228	Back Bay Boat B&B	Yellowknife	NT	3	6	70
	235	Captain Ron's Bed & Breakfast	Yellowknife	NT	4		85
	250	Sah Naji Kwe Spa & Meeting Place	Rae	NT	14	42	92
Motel	27	Gameti Motel	Rae Lakes	NT	8	20	214
	188	Northern Lites Motel	Yellowknife	NT	26	47	90
Hotel	10	The Yellowknife Inn	Yellowknife	NT	129	175	99
	59	Super 8 Motel	Yellowknife	NT	66	124	154
	119	The Explorer Hotel	Yellowknife	NT	128	260	135
	142	Chateau Nova	Yellowknife	NT	60	195	135
	244	Capital Suites Yellowknife	Yellowknife	NT	78	234	89
Lodge	108	Hearne Lake Lodge	Leslieville	AB	8		
	179	Treeline Lodge	Yellowknife	NT	22	34	220
Cabins	100	Lac La Martre Lodge	East Troy	WI	7	16	

Total 19

Table 24: North Slave Attractions

	ID	Company	Location	P/T
Industry Conference	61	Prince Of Wales Nothern Heritage Centre	Yellowknife	NT
	189	John A's Paleo Emporium	Yellowknife	NT
Cultural Attraction	78	Old Town Float Base	Yellowknife	NT
	205	Artico Biota Studio	Yellowknife	NT
Craft shop/Gallery	30	Sasha's	Yellowknife	NT
	65	Polar Parkas	Yellowknife	NT
	84	Northern Transition	Yellowknife	NT
	86	Northern Images (Yellowknife)	Yellowknife	NT
	93	Nor-Art	Yellowknife	NT
	148	Gallery of the Midnight Sun	Yellowknife	NT
	156	Langlois	Yellowknife	NT
	191	Jan's Card & Gift	Yellowknife	NT
	192	Northern Souvenir & Gift Shop	Yellowknife	NT
	193	Jamorah Diamonds	Yellowknife	NT
	221	Birchwood Gallery Ltd.	Yellowknife	NT
	262	Aurora Gallery	Yellowknife	NT
	296	Dawn Oman	Yellowknife	NT

Total 18

Table 25: North Slave Transportation

	ID	Company	Location	P/T	Rental Type	Transport Type
Taxi	81	Nunasi Helicopters	Yellowknife	NT	.	.
	208	Arctic Executive Limousines	Yellowknife	NT	Car/truck	.
	216	AC Taxi	Wha Ti	NT	.	.
	240	City Cab Ltd.	Yellowknife	NT	.	.
	310	Diamond Cabs	Yellowknife	NT	.	.
Rentals	34	Ted's U-Drive Ltd.	Yellowknife	NT	Car/truck	.
	41	Royal Rent-a-Car/Rent-a-Relic Truck	Yellowknife	NT	Car/truck	.
	57	National Car & Truck Rentals	Yellowknife	NT	Car/truck	.
	105	Hertz Car Rental	Yellowknife	NT	Car/truck	.
	256	Budget Car & Truck Rental	Yellowknife	NT	Car/truck	.
Scheduled/Charter	211	Air Tindi	Yellowknife	NT	.	Plane & Float
	275	Northright Airways	Norman Wells	NT	.	Plane & Float
Charter	9	Rae Edzo Friendship Express	Rae	NT	.	.
	36	Ursus Aviation	Tulita	NT	.	Plane & Float
	115	Great Slave Helicopters	Yellowknife	NT	.	Helicopter
	150	Frontier Coachlines NWT	Hay River	NT	.	Bus
	212	Adlair Aviation	Yellowknife	NT	.	Plane
	241	Carson Tours Ltd.		AB	.	Bus
	272	Arctic Sunwest Charters	Yellowknife	NT	.	Plane & Float

Total 19

South Slave

In the South Slave region 22 adventure/recreation businesses described their products. Thirteen were fishing operations primarily. Other operations included outfitting, hunting, dog-sledding, canoeing and cruising. The season of operation for all business was between June and October.

Table 26: South Slave Adventure/Recreation Operations

Primary Product	ID	Company	Location	P/T	Second Product	Third Product
Outfitting	114	Great Slave Tours	Hay River	NT	Aurora Viewing	Nature Viewing
	184	Tucho Tours	Fort Resolution	NT	Aurora Viewing	Cultural Interpretation
	245	MSS Ltd.	Hay River	NT		
	302	Aurora Nights Lodge	Fort Resolution	NT	Fishing	
Hunting	124	Deh Cho Wilderness Tours Ltd.	Fort Providence	NT		
Fishing	6	Thuban Lake Lodge	Lacombe	AB		
	20	Sandy Point Lodge	Hay River	NT	Cultural Interpretation	
	39	Rocky Bay Fishing Lodge	Pleasanton	CA		
	90	North Star Resort	Fort Smith	NT		
	125	Donovan Lake Outfitters	Fort Smith	NT		
	131	Deegahani Lake Camp	Hay River	NT		
	133	Lady Grey Lake Outfitters	Fort Smith	NT		
	141	Canadian Wild Wilderness Outfitter	Woodbridge	ON		
	149	Frontier Fishing Lodge	Edmonton	AB		
	171	Lynx Tundra Lodge	Fort Smith	NT	Canoeing	
	204	Aurora River Tours and Rentals	Fort Providence	NT	Nature Viewing	
	215	Alcantara Outfitting	Fort Smith	NT		
	258	Brabant Lodge	Hay River	NT		
Dog-sledding	44	Red Baron Kennels	Fort Smith	NT		

Canoeing	137	Canoe Arctic Inc.	Fort Smith	NT
Cultural Interpretation	237	Dakota Island Cultural Camp	Fort Resolution	NT
Cruise ship	82	NWT Marine Group	Edmonton	AB

Total 22

Table 27: South Slave Accommodations

	ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
B&B	111	The Anchorage	Hay River	NT	10	20	65
	112	Harbour House	Hay River	NT	7	16	65
	185	Tucho B&B	Fort Resolution	NT	5	12	125
Motel	162	The Migrator Motel	Hay River	NT	22	44	80
	234	Cedar Rest Motel	Hay River	NT	9	10	85
	242	Caribou Motor Inn (& Restaurant)	Hay River	NT	28	112	
	300	Big River Motel	Fort Providence	NT	12	24	75
Inn	22	Pelican Rapids Inn	Fort Smith	NT	31	55	125
	32	Snowshoe Inn (NWT) LTd.	Fort Providence	NT	35	70	115
	51	Twin Falls Inn	Enterprise	NT	10	20	85
	66	Homesteaders Inn	Hay River	NT	23	46	80
	101	Ptarimgan Inn	Hay River	NT	43	70	100
Lodge	21	Mountain Aven Enterprises	Hay River	NT	6		
	133	Lady Grey Lake Outfitters	Fort Smith	NT	1	8	
	302	Aurora Nights Lodge	Fort Resolution	NT		16	
Cabins	131	Deegahani Lake Camp	Hay River	NT	2	12	250
	141	Canadian Wild Wilderness Outfitter	Woodbridge	ON	2	8	
	149	Frontier Fishing Lodge	Edmonton	AB			
	215	Alcantara Outfitting	Fort Smith	NT	5	15	130
	258	Brabant Lodge	Hay River	NT			

Total 20

Table 28: South Slave Attractions

	ID	Company	Location	P/T
Cultural Attraction	83	Northern Transportation Company Ltd.	Hay River	NT
Craft shop/Gallery	12	Winnie's Dene Art Gallery & Gift Shop	Enterprise	NT
	87	Northern Delights	Fort Smith	NT
	251	Cabin Fever	Hay River	NT
	280	Gold 'n' Gift	Hay River	NT
	32	Snowshoe Inn (NWT) Ltd.	Fort Providence	NT

Total 6

Table 29: South Slave Transportation

	ID	Company	Location	P/T	Rental Type	Transport Type
Taxi	252	C&A Holdings Taxi	Fort Providence	NT	.	.
	259	Border Cabs	Fort Smith	NT	.	.
Rentals	203	Avis Rentals	Fort Smith	NT	Car/truck	.
Scheduled/Charter	88	Northwestern Air Lease Ltd.	Fort Smith	NT	.	Plane
	211	Air Tindi	Yellowknife	NT	.	Plane & Float
	255	Buffalo Airways	Hay River	NT	.	Plane & Float
Charter	42	Remote Helicopters Ltd	Hay River	NT	.	Helicopter
	150	Frontier Coachlines NWT	Hay River	NT	.	Bus
	173	Reliance Airways Ltd.	Fort Smith	NT	.	Plane & Float
	207	Arctic Excursions Ltd.	Fort Smith	NT	.	Plane & Float
	220	Big River Air	Fort Smith	NT	.	Plane & Float
	317	Landa Aviation	Hay River	NT	.	Plane

Total 12

Inuvik

The Inuvik region included 16 adventure/recreation businesses, many reporting more than one tourism product. Outfitting and hunting were the main types of business in addition to dog-sledding, canoeing, cultural interpretation, and nature, wildlife and aurora viewing. Again, the main season of operation was June to October, and one outfitter reported operating December to May.

Table 30: Inuvik Adventure/Recreation Operations

Primary Product	ID	Company	Location	P/T	Second Product	Third Product	Fourth Product
Outfitting	17	Noksana'a Big Game Guiding to Adventures	Tuktoyaktuk	NT	Hunting		
	219	Bekere Lake Lodge & Outfitters	Paulatuk	NT	Hunting		
	226	Banks Island Big Game Hunts	Sachs Harbour	NT	Hunting		
	267	Banks Island Tundra Tours	Sachs Harbour	NT	Wildlife Viewing		
Hunting	73	Paulatuk Big Game Outfitting & Guiding Services	Paulatuk	NT			
	76	Pokiak Guiding & Outfitters	Tuktoyaktuk	NT			
	102	Chuck Gruben's Guiding & Outfitting	Tuktoyaktuk	NT	Nature Viewing	Wildlife Viewing	Cultural Interpr
Fishing	274	Arctic Hills Tour Co.	Holman	NT	Dogsledding	Wildlife Viewing	Aurora Viewing
Dog-sledding	278	Arctic Chalet Ltd.	Inuvik	NT	Outfitting		
Canoeing	275	Northright Airways	Norman Wells	NT			
Nature Viewing	181	Kuptana's Outfitting & Nature Tours	Sachs Harbour	NT			
	281	Four Seasons Arctic Adventures	Aklavik	NT	Wildlife Viewing	Aurora Viewing	Cultural Interpr
Wildlife Viewing	271	Air Thelon Ltd.	Yellowknife	NT	Outfitting	Fishing	Canoeing
Aurora Viewing	229	Arctic Tour Company Ltd.	Tuktoyaktuk	NT	Dogsledding	Snowmobiling	Cultural Interpr

Cultural Interpretation	77	Ookpik Tours & Adventures	Tuktoyaktuk	NT
	159	Midnight Express Tours	Inuvik	NT

Total 16

Table 31: Inuvik Accommodations

	ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
B&B	15	Arctic Chalet Ltd.	Inuvik	NT	.	.	.
	40	Robertson's B & B	Inuvik	NT	2	.	.
	68	Polar B&B	Inuvik	NT	4	10	95
	132	Bessie's Boarding House	Aklavik	NT	7	11	150
	180	Kuptana's Guest House	Sachs Harbour	NT	5	12	220
	229	Arctic Tour Company Ltd.	Tuktoyaktuk	NT	.	.	.
Motel	278	Arctic Chalet Ltd.	Inuvik	NT	11	40	130
Hotel	155	Eskimo Inn	Inuvik	NT	72	144	139
	244	Capital Suites Yellowknife	Yellowknife	NT	78	234	89
	276	Arctic Char Inn	Holman	NT	8	16	185
	309	Mackenzie Hotel	Inuvik	NT	.	.	159
	318	Finto Lodge	Inuvik	NT	.	.	159
Inn	200	Hotel Tuk Inn Ltd.	Tuktoyaktuk	NT	14	26	145
Lodge	219	Bekere Lake Lodge & Outfitters	Paulatuk	NT	4	10	.
Total	14						

Table 32: Inuvik Attractions

	ID	Company	Location	P/T
National Park	230	Aulavik National Park of Canada	Sachs Harbour	NT
Craft shop/Gallery	75	Originals on Mackenzie	Inuvik	NT
	85	Northern Images (Inuvik)	Inuvik	NT

Total 3

Table 33: Inuvik Transportation

	ID	Company	Location	P/T	Rental Type	Transport Type
Taxi	52	Joanne's Taxi	Tuktoyaktuk	NT	.	.
	56	Town Cab	Inuvik	NT	Car/truck	.
Rentals	278	Arctic Chalet Ltd.	Inuvik	NT	Canoe/kayak	.
Scheduled/Charter	206	Aklak Air	Inuvik	NT	.	Plane
	223	Air North, Yukon's Airline	Whitehorse	YK	.	Plane
	275	Northright Airways	Norman Wells	NT	.	Plane & Float
Charter	23	MGM Services	Inuvik	NT	.	Bus
	268	BeauDel Air	Inuvik	NT	.	Plane & Float
	289	FES Greenlands Bus & Taxi	Aklavik	NT	Car/truck	Bus

Total 9

Deh Cho

The Deh Cho region included 7 adventure/recreation businesses, a seemingly small representation for this area. The operations included outfitting, hunting, fishing, canoeing, rafting and cultural interpretation. The season of operations was June to October primarily.

Table 34: Deh Cho Adventure/Recreation Operations

Primary Product	ID	Company	Location	P/T	Second Product	Third Product
Outfitting	222	Blackfeather Wilderness Adventure Co.	Parry Sound	ON	Canoeing	
Hunting	8	South Nahanni Outfitters Ltd.	Whitehorse	YK		
	97	Nahanni Butte Outfitters Ltd.	Hudson's Hope	NT		
Fishing	54	Trout Lake Lodge/Transient Centre	Trout Lake	NT		
Canoeing	29	Nahanni Wilderness Adventures	Canmore	AB	Outfitting	Rafting
Rafting	160	Nahanni River Adventures Ltd.	Whitehorse	YK	Canoeing	
Cultural Interpretation	225	Bannockland B&B	Fort Simpson	NT		

Total 7

Table 35: Deh Cho Attractions

	ID	Company	Location	P/T
Museum	151	Fort Smith Northern Life Museum	Fort Smith	NT
Craft shop/Gallery	24	Lynx River Craft Shop	Fort Simpson	NT
	152	Acho Dene Native Crafts	Fort Liard	NT

Total 3

Table 36: Deh Cho Accommodations

	ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
B&B	196	Lucy's B&B	Fort Simpson	NT	2	4	100
	225	Bannockland B&B	Fort Simpson	NT	5	10	135
	322	Janor Guest House	Fort Simpson	NT	3	6	
Motel	49	W&L Emporium Ltd.	Fort Simpson	NT	8	8	90
	54	Trout Lake Lodge/Transient Centre	Trout Lake	NT	3	6	135
	165	Nahanni Inn	Fort Simpson	NT	30	60	125
	166	Maroda Motel	Fort Simpson	NT	16	32	125
	177	Liard Valley General Store & Motel	Fort Liard	NT	12	40	95
Inn	99	South Nahanni Inn	Fort Simpson	NT	4	8	90
Lodge	306	Det'an Cho Tourist Camp	Fort Resolution	NT	6	24	
Cabins	176	Lindberg Landing	Fort Simpson	NT		14	80
	190	Jean Marie River Transient Centre	Jean Marie River	NT	1	4	100

Total 12

Table 37: Deh Cho Transportation

	ID	Company	Location	P/T	Rental Type	Transport Type
Taxi	218	B&L Taxi	Fort Simpson	NT	.	.
Rentals	26	K&K Expediting	Fort Simpson	NT	Car/truck	.
Scheduled/Charter	211	Air Tindi	Yellowknife	NT	.	Plane & Float
Charter	11	Wolverine Air Ltd.	Fort Simpson	NT	.	Plane & Float
	96	Simpson Air (1981) Ltd.	Fort Simpson	NT	.	Plane & Float
	217	Alkan Air Ltd.	Whitehorse	YK	.	Plane
	247	Canadian Helicopters	Fort Simpson	NT	.	Helicopter
	294	North Cariboo Air - Fort Liard	Fort Liard	NT	.	Plane
	1	Nahanni Mountain Lodge	Fort Simpson	NT	.	Plane & Float

Total 9

Sahtu

The Sahtu region included 10 adventure/recreation businesses, mostly outfitting, hunting and fishing. Canoeing and nature viewing were the only other tourism products reported. Operations were mainly July to September with two primarily fishing operations reporting year round activity.

Table 38: Sahtu Adventure/Recreation Operations

Primary Product	ID	Company	Location	P/T	Second Product	Third Product
Outfitting	195	Shoreline Outfitting	Deline	NT	Fishing	
	288	Great Bear Lake Outfitting	Deline	NT	Hunting	Fishing
Hunting	43	Redstone Trophy Hunts	Pink Mountain	BC		
	80	NWT Outfitters Ltd.	Courtenay	BC		
	169	Mackenzie Mountain Outfitters	Dawson Creek	BC	Fishing	
Fishing	161	Modeste Outfitters	Deline	NT		
	199	Hume River Enterprises	Fort Good Hope	NT	Wildlife Viewing	Cultural Interpretation
	239	Colville Lake Lodge	Colville Lake	NT		
Canoeing	275	Northright Airways	Norman Wells	NT		
Nature Viewing	122	Dechenla Lodge	Whitehorse	YT	Wildlife Viewing	Cultural Interpretation

Total 10

Table 39: Sahtu Attractions

	ID	Company	Location	P/T
Museum	145	Norman Wells Historical Centre	Norman Wells	NT
Craft shop/Gallery	121	Creations	Norman Wells	NT
	239	Colville Lake Lodge	Colville Lake	NT

Total 3

Table 40: Sahtu Accommodations

	ID	Company	Location	P/T	# of Rooms	# of Guests	Rate per night
B&B	107	Homesteaders B&B	Fort Good Hope	NT	7	14	100
	140	Caribou Corner B&B	Norman 'Vells	NT	2	4	130
	175	Little Dipper B&B	Fort Good Hope	NT	3	4	140
	238	Colville Lake B&B	Colville Lake	NT	3	6	245
	304	Blueberry B&B	Tulita	NT	3	5	165
Hotel	47	Ramparts Hotel	Fort Good Hope	NT	6	10	180
	139	Two Rivers Hotel	Tulita	NT	8	12	160
	168	Mackenzie Valley Hotel	Norman Wells	NT	50	100	150
Inn	45	Rayuka Inn	Norman Wells	NT	10	20	125
Lodge	122	Dechenla Lodge	Whitehorse	YT		14	
	126	Drum Lake Lodge	Tulita	NT	3	18	
	239	Colville Lake Lodge	Colville Lake	NT	5	22	
	287	Grey Goose Lodge	Deline	NT	12	26	145

Total 13

Table 41: Sahtu Transportation

	ID	Company	Location	P/T	Transport Type	Rental Type
Rentals	55	Trav-Car Holdings Inc	Norman Wells	NT	.	Car/truck
	92	Norman Wells Transportation Ltd.	Norman Wells	NT	.	Car/truck
Scheduled/Charter	275	Northright Airways	Norman Wells	NT	Plane & Float	.
Charter	89	North-Wright Airways Ltd.	Norman Wells	NT	Plane & Float	.
	217	Alkan Air Ltd.	Whitehorse	YK	Plane	.

Total 5

Tourism Opportunity Identification

NWT's Assets

The NWT contains a number of primary assets that are marketable as world-class products. These assets offer the NWT a unique product and a competitive advantage in the international arena. These assets include the following:

- Unique large mammals such as grizzly bears, polar bears, caribou, whales and muskox
- World renowned paddling rivers such as the Nahanni and the Coppermine
- National parks and reserves such as: Nahanni National Park Reserve, Wood Buffalo National Park, Tuktut Nogait National Park, and Aulavik National Park
- The Arctic Ocean
- Northern lights
- Diverse and unique aboriginal cultures
- World-class rock climbing
- World-class hunting and fishing
- Large expanses of wilderness

The development of tourism product starts with capitalizing the assets listed above. The following are assets that could be leveraged into profitable tourism products such as:

- The great caribou migration
- Winter experience smorgasbord
- Activities under the midnight sun
- Rock climbing in the Cirque of the Unclimbables
- Sea kayaking
- Arctic journeys

SWOT Analysis

This section includes one summary SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, seven regional SWOT analyses and one Aboriginal tourism SWOT analysis. These are the result of input by stakeholders obtained during the community consultation process as well as input by the consultants. There is a high degree of repetition or commonality among the regional analyses. There was no attempt made to reduce this repetition as this often indicates the importance to the stakeholders and consistency across the NWT.

The SWOT analysis provides information on a region, area or community's real and perceived strengths, weaknesses, opportunities and threats which can be described as follows:

Strengths:

- The advantages of a region
- What can be characterised as being done well
- What relevant resources are available
- What other people (form the outside) see as strengths
- What is unique, different and attractive
- What provides a competitive advantage

Weaknesses:

- What could be improved
- What are seen as deficiencies
- What can be characterised as being done badly
- What should be avoided
- What other people (form the outside) see as weaknesses
- What can be considered a competitive disadvantage

Opportunities

- Unexploited markets, trends and opportunities

Threats

- What obstacles is the region facing
- Who is the competition and how is it behaving
- Changing markets

The SWOT analyses are arranged as follows:

1. Summary SWOT
2. The North Slave Region
3. The South Slave Region:
    a. The Hay River area
    b. The Fort Smith area
4. The De Cho Region
5. The Inuvik Region:
    a. The Inuvik area
    b. The Tuktoyaktuk area
6. The Sahtu Region
7. Aboriginal Tourism SWOT

Summary SWOT Analysis

The following SWOT analysis contains a summary of the main findings seen as the most important and that were common amongst the regional SWOT analyses.

Strengths

- International calibre natural features and attractions which offer a distinctive competitive advantage: large mammals, world-class hunting and fishing, northern lights, large lakes, rivers, ocean, varied and uncommon landscapes
- Aboriginal/Cultural Heritage: the NWT is home to a variety of unique First Nations people rich in heritage and culture
- Wilderness and remoteness: most of the territory is unspoiled and is viewed as wild and mostly unexplored territory.
- Un-crowded: vast area with few residents or tourists which is different than many other tourism destinations
- Safe Destination: the NWT is seen as a safe compared to other international destinations
- Provides Overseas Experience: because of its different landscapes, wildlife and culture, a visit to the NWT provides North American visitors with an experience similar to that offered by overseas travel
- Destination Marketing Organization effective in marketing the NWT: Northwest Territories Tourism seen as being effective in marketing the Northwest Territories as a destination

Weaknesses

- Lack of territory-wide tourism development strategy: no master tourism development strategy to coordinate and provide direction for future tourism development
- Acute Shortage of Developed Products: lack of regional, market ready, international calibre tourism products
- Lack of Trained Workforce: shortage of tourism trained workforce in all areas including front-line, management and service delivery areas
- Lack of Quality Infrastructures: infrastructures do not meet the quality standard expected by tourists especially when compared to other destinations
- Lack of Aboriginal Products: not enough aboriginal products and services that offer authentic/traditional cultural experience to travelers
- Difficulty and Cost of Access: expensive and difficult to get to the NWT compared to other destinations. Great distances to travel to the NWT and within the NWT
- The many unpaved roads and ferries are a disincentive to RV tourists
- Lack of Regional Representation/Marketing: regions have limited marketing budgets and feel they are no able to compete with other regions and destinations
- Lack of Packaging/bundling: not enough packages to meet the growing needs of the modern travellers

Opportunities

- Packaging and bundling: develop packages to meet the demand
- Product Development: develop and implement a product development strategy.
- Aboriginal Involvement: increase products and services that offer traditional/authentic aboriginal experience
- Eco and Adventure Products: The NWT has the necessary assets to develop these products that are in high-demand
- Training and Education: develop and implement a tourism workforce training and education plan.
- Increase tourism advocacy and create awareness of the socio-economic benefits of tourism
- Diversification of Existing Products: diversify existing products offered by existing operators such as hunting and fishing lodges
- Regional Marketing: increase marketing resources available to the regions and increase the presence of regions in marketing initiatives

Threats

- Competition from other Canadian destinations such as the Yukon and Nunavut
- International competition from similar destinations such as Greenland, Russia and the Scandinavian countries
- Competition from the oil and gas sector: oil, gas and mining sectors are competing for same labour pool and natural resources as tourism
- High Cost of Living: expensive to travel within the NWT compared to other destinations
- High Cost of Travel to the North: expensive to travel to the NWT compared to other destinations
- Cost/Availability of Insurance: in many instances, the cost of insurance alone is likely to discourage business start-ups or significantly impact the bottom line of an operation
- Difficulty of Land Access: long, difficult and expensive to obtain land access. In some cases it is impossible to obtain the necessary land access to start and operate a tourism business
- Subsidized Housing: those individuals benefiting from subsidized housing will see a substantial decrease of their housing subsidy if they start earning revenues from a tourism business. This is likely to discourage business start-ups
- Lack of Critical Mass to Start/Maintain a business: in many areas there are not enough visitors or existing businesses to justify starting a tourism business

The North Slave Region SWOT Analysis

The information contained in this SWOT analysis was obtained through a focus group meeting held at the Northwest Territories Tourism's November conference and annual general meeting in Yellowknife.

Strengths

- International calibre natural features and attractions which offer a distinctive competitive advantage: large mammals, hunting, fishing, northern lights, large lakes, aboriginal culture
- Most of the territory is unspoiled and seen as wild and mostly unexplored

- Un-crowded: vast area with few residents or tourists which is different than many other tourism destinations
- Aboriginal heritage
- National and Territorial Parks
- Variety of landscapes: lakes, rivers, mountains, barren lands which are different than many other destinations
- Image of wilderness and remoteness
- Considered a safe destination: safety now a concern with many travelers
- Established world class products (hunting, fishing)
- World class paddling rivers
- Destination Marketing Organization effective in marketing territory - Northwest Territories Tourism seen as being effective in marketing the Northwest Territories as a destination
- Tourists can enjoy an international calibre experience without going overseas because of the foreign looking landscapes and aboriginal culture
- Diamond mining: diamond mining is unique especially within a tourism destination

Weaknesses

- Acute shortage of developed tourism products: lack of regional, market ready, international calibre tourism products
- Lack of trained workforce: shortage of tourism trained workforce in all areas including font-line, management and service delivery areas
- Difficulty and costs of access by vehicle: great distances to travel to the NWT and within the NWT, many unpaved roads, ferries, etc.
- The many unpaved roads and ferries are a disincentive to RV tourists
- Difficulty and cost of access by air. Although air access is available travelers need more time to travel to and from regions with significant additional costs
- Lack of mid to high-end products
- Lack of mid to high-end accommodation
- Lack of mid to high-end food and beverage establishments
- Inadequate regional marketing: regions feel that although the NWT as whole is well marketed they do not market the individual regions adequately
- Lack of aboriginal tourism products: not enough aboriginal products and services available to travelers

- Lack of tourism training programs in schools: tourism not seen as potential career, no development and training of a tourism workforce
- General quality of tourism product unable to meet requirements of a large portion of the existing and potential tourism markets
- Limited marketing budget: not enough to compete with other regions and destinations

Opportunities

- Develop and implement product development strategy: need a plan to develop more tourism products
- Tourism products developed around natural features and attractions: NWT is home to many world class natural attractions
- Edu-tourism/experiential tourism: learning vacations and living experiences are a growing market
- Packaging and bundling of products: need more market ready packaging
- Involvement of First Nations: First Nations are a large part of the cultural tourism potential
- Aboriginal tourism products: more aboriginal tourism products and services needed
- Ecotourism and adventure tourism product development: NWT has many natural assets and features that can be used to develop ecotourism and adventure tourism products
- Environmentally friendly tourism products: travelers are becoming increasingly concerned with the environment
- Families as a client group: growing segment of the travel market
- The RV market: growing segment of the travel market
- Target international markets such as US, Europe, Japan and China
- Develop and implement a tourism workforce training and education plan: need to develop a trained workforce
- Increase tourism advocacy and create awareness of the benefits of tourism: tourism is beneficial in terms of economic impact and job creation

Threats

- Competition from Canadian destinations (Yukon, Nunavut, Quebec)
- Competition from international tourism destinations (Russia, Greenland and Scandinavian nations) for Arctic tourism
- Competition from elsewhere and everywhere for hunting and fishing

- Hunting and fishing market is aging: the existing market (baby boomers) is aging. Need to diversify or attract new markets
- Market is becoming more sophisticated and demanding: travelers want quality products and service
- Oil, gas and mining sectors are competing for same labour pool as tourism
- Oil, gas and mining are competing for same natural resources as tourism
- Lack of critical mass necessary to entice business start-ups: in many areas there aren't enough travelers to justify a tourism business start-up
- Insurance cost and availability: in many instances, the costs of insurance alone is likely to discourage business start-ups or significantly impact the bottom line of an operation
- Difficulty with land access: difficult to obtain the necessary land-use permits to operate a tourism business
- Lack of tourism awareness amongst NWT residents: tourism not necessarily a priority and/or lack of awareness on the benefits of tourism
- Social measures such as subsidized housing: those individuals benefiting from subsidized housing will see a substantial decrease of their housing subsidy if they start earning revenues from a tourism business. This is likely to discourage business start-ups
- Increased concerns regarding consumptive tourism: growing uneasiness with hunting and fishing
- The younger generation has less money to spend on holidays
- High cost of living in the north: expensive to travel in the NWT
- Tourism is competing with other expenditures such as home renovation, big screen televisions, vehicles, etc.
- Tourism careers not seen as a viable option compared to oil, gas and mining
- Higher oil prices mean higher cost of travel by air and vehicle

The South Slave Region SWOT Analysis

The information contained in this SWOT analysis was obtained through focus group meetings and interviews with stakeholders in Hay River and Fort Smith in early December.

The Hay River area

Strengths

- Close to major highway, accessible by vehicle; seen as one of the more accessible regions in the NWT
- On the shore of Great Slave Lake: Great Slave Lake seen as a significant asset that is not exploited
- Great sandy beach on Great Slave Lake: one of very few beaches in the NWT
- The Dene First Nation: area is home to the only reserve in the NWT
- Winter Carnival
- Northern Lights: as good or better than other regions of the NWT
- Cross country ski trails: one of the most developed cross country ski centres in the NWT
- Snowmobiling: area as good snowmobile potential

Weaknesses

- Very few tourism operators: very few existing operators and very few individuals interested in getting into tourism business
- Lack of tourism products: not enough products to attract travelers to region or keep travelers in region
- Only 344 beds in Hay River: limited beds are often taken by resource, construction and government workers. Would not be able to accommodate an increase in traveller numbers or bus tours
- Accessibility by vehicle: area is still far from large centres
- Inadequate regional marketing: although the NWT as a whole is seen as being well marketed, the region feels like it is not able to market itself adequately and compete with other regions of the NWT
- Lack of tourism trained workforce
- Expensive to fly into region: travelers will opt for other regions or destinations
- Lack of quality tourism infrastructures: lack of high calibre accommodation able to cater to today's more sophisticated traveler
- Inadequate highway signage: better signage needed to get travelers off the main highway into Hay River and inform travelers of services
- No public marina on the lake: lake seen as great potential to attract boaters but a public marina is needed

Opportunities

- Develop cultural and aboriginal products with the Dene First Nation

- Snowmobile rental business: necessary if snowmobiling is seen a potential tourism product
- Snowmobile tour business
- Revive the South Slave Tourism Association: association needed to bring region together and develop tourism strategy, marketing, product development, advocacy, etc.
- Tourism training for locals: need to train/inform the general population on the benefits of tourism, the expectations of tourists and the basics of quality service delivery
- Provide assistance to those interested in tourism: support tourism entrepreneurs financially, provide training and mentoring
- Developing a four-season resort to take advantages of waterfalls, lakes and trails
- Develop the ice climbing potential on Louise and Alexandra Falls
- Develop fossil and rock collecting at Escarpment Creek
- Development of multi-day, multi-activity winter packages
- Need to attract the bus tours that already travel on highway
- Packaging of tourism products: packages are currently almost non-existent
- All-inclusive packages: similar to all-inclusive resorts, these packages could include everything such as equipment e.g. snowmobile and clothing
- Need product development plan with mentoring and training: a program should be developed to assist entrepreneurs not only financially but with training in tourism and small business management

Threats

- Price of gasoline on the increase which affects rubber tire traffic
- Rise of the Canadian dollar: affects visitation from US but also means US becomes a more attractive destination to Canadians
- Competition from the oil, gas and mining industries: many individuals, groups and communities are more interested in developing the oil and gas industry than the tourism industry
- Cost of licensing and insurance: cost of insurance and other business licensing requirements seen as an significant impediment to small business start-ups
- Land access and land lease issues: long, difficult and expensive to obtain land access. In some cases it is impossible to obtain the necessary land access e.g. commercial snowmobiling

- North Slave region favoured over South Slave region: it is perceived that more efforts and resources are put into the North Slave region
- RV visitation is down
- Region is bypassed by most traffic: most drive through to other regions without stopping in area
- Tourism is not part of the local culture

The Fort Smith area

Strengths

- Northern lights: as good or better than in other regions
- Slave River: the river is seen as major attraction and asset
- Wilderness
- Un-crowded

Weaknesses

- No developed tourism products: tourism products are almost non-existent in the area
- No major airline servicing the community: difficult and somewhat expensive to get in and out of community
- The small airline which does serve the community cannot carry large objects as luggage: small aircrafts cannot carry items such as kayaks
- Difficult to get to Fort Smith: access is difficult both by road or air
- The largest park in North America has only one licensed operator: Wood Buffalo National Park is not developed to attract or accommodate tourists

Opportunities

- Wood Buffalo National Park: this park could become major attraction
- River rafting: river rafting potential in the Slave River
- Involvement of aboriginal entrepreneurs: need the involvement of aboriginals because they have easier access to land and can develop aboriginal products which are in demand
- Improve air access to region
- Open Wood Buffalo to more operators: need to allow more tourism development in park and allow operators to use park to develop tourism products
- Develop plan to get young people interested in tourism: need to develop tourism advocacy to get individuals interested and involved

in tourism at a younger age. Need to get young entrepreneurs interested in tourism development

- Develop products that use existing fishing and hunting lodges: develop new products in partnership with lodges. This will create new products for the area and diversify product offering of lodges
- Develop business incubation-mentoring program: need to support business start-up with financial and non-financial resources for an extended period of time.
- Develop tourism around festivals and visiting friends and relatives (VFR): area has many festivals, events, tournaments and family reunions

Threats

- Forest fires of last summer: fires had a negative impact that is still felt
- Hunting and fishing lodges charter directly to their lodges thereby bypassing Fort Smith: community does not get benefits from area lodges
- Lack of critical mass to make starting business viable: not enough tourists to support a new business start-up
- Lack of interest of existing operators: area operators are not interested in getting involved in tourism development
- Oil, gas and mining industries are competing for the same labour pool and offering higher wages
- Lack of tourism education in schools: tourism not seen as potential employment or career
- There are no products to market
- Land access: almost impossible to access land for any tourism product Land is a park or tied to land claims issues
- There are not enough product to develop packages

The De Cho Region SWOT Analysis

The information contained in this SWOT analysis was obtained through a focus group meeting and interviews with stakeholders in Fort Simpson in early December.

Strengths

- Gateway to Nahanni National Park: community benefits from being the access point for Nahanni National park
- Nahanni National Park is the major tourist attraction
- Tourism lodges: many tourism lodges in the area could be further developed
- Open Sky Festival: annual festival that attracts people from outlying communities
- Liard and Mackenzie Rivers: potential to develop products around these 2 major rivers

Weaknesses

- The town is not "touristy looking" and could benefit from a beautification initiative
- Gravel road is only road access: many travellers, RV's and buses will avoid gravel roads
- Not enough tourism product: not enough products to market or attract or retain visitors
- Deficient highway signage in BC and on the Alaska Highway: need better signage to invite travellers on the Alaska highway to visit region
- Locals not trained in tourism
- Lack of quality accommodation
- Fort Liard does not have a restaurant and only a 12-room hotel
- No propane or diesel sold in Fort Simpson: this is a problem for RV's and buses
- Money from many big game lodges does not stay in community: tourists go directly into lodge and do not stay in community to spend their money
- Winter is too cold for tourism: too cold to develop winter tourism products such as snowmobiling

Opportunities

- Capturing Alaska Highway traffic: need to tap into this large market and get travellers to come to region as a alternative to driving through
- Developing activities on the Mackenzie River: canoeing, boat tours, etc.
- Develop snowmobiling products. Could be offered later in season when it is warmer and light is better
- Develop products around Northern Lights
- Tourism training: training needed for locals and future employees
- Boat tours on the 2 rivers

- Business start-up assistance: need to help business start-up by providing financial assistance and ongoing support
- Product development initiative with training and financial assistance
- Develop cultural tourism products
- Canadian Heritage River designation for the Mackenzie River: this designation would bring attention to the river and the region
- Manufacturing and selling of aboriginal products (snowshoes and drums)
- Diversify product offering of lodges with snowmobiling and Northern Lights
- Tourism training for front-line people
- Advocacy regarding tourism career opportunities: tourism not seen as a potential career especially compared to oil and gas

Threats

- Competition with oil and gas sector - the proposed Mackenzie Valley pipeline would go through Fort Simpson: much of the community's hopes, effort and energy are spent on the potential pipeline
- Lack of critical mass to start and sustain a tourism business: not enough tourism volume to sustain a business through business start-ups
- High cost of living: expensive area to visit
- Gap between head office and the region regarding the product development needs: region feels that more effort needs to be put into product development
- Disconnect between marketing and product development: although marketing efforts are encouraged and appreciated more products need to be developed in order to be marketed
- Locals do not have the financial means to start tourism businesses
- Subsidized housing penalizes revenue generating initiatives: the housing subsidy decreases significantly when an individual receives revenues from a new business therefore discouraging the start-up of a tourism business
- There is a need for more aboriginals to be involved in tourism. Other destinations are developing aboriginal tourism products and attracting tourists looking for a First Nations' experience
- Lack of young entrepreneurs
- Lack of continuity with economic development officer: changes in staffing have a negative impact on tourism development

The Inuvik Region SWOT Analysis

The information contained in this SWOT analysis was obtained through focus group meetings and interviews with stakeholders in Inuvik and Tuktoyaktuk in late October.

The Inuvik area

Strengths

- Natural features: Pingos, midnight sun, Arctic Ocean, Northern lights, Tuktoyaktuk and Hershel Island
- Culture: Inuvik has a diverse cultural population which offers a great overview of the people and way of life in the territory; specifically gift shops and the visitor centre
- Whaling camps: There are traditional whaling sites accessible by boat as a day-trip from Inuvik
- Wildlife viewing: Migratory/seasonal birds and caribou are seen in the Inuvik area
- Great Northern Arts Festival: The festival attracts artists from the circumpolar world and is known to fill Inuvik to capacity
- The northern most golf course: Inuvik is home to the northern most golf course and there is talk of incorporating both Yukon and Holman to do a northern golf adventure
- Rivers and canoeing: staging ground for the Horton, Hornaday, Mackenzie, offer canoe rentals and plane shuttles
- Dempster Highway: said to be the only market ready product that locals feel like they can offer in the area
- Ice Road: There are ice roads connecting Inuvik to several of the surrounding communities in the winter/spring
- National Parks: Inuvik is the major centre accessing the 4 national parks in the NWT. The National Park office headquarters is located in Inuvik and offers excellent information and help to travelers

Weaknesses

- Marketing specifically for region: most of the marketing comes out of Yellowknife and reflects the southern NWT only
- Lack of year-round products: summers are busy but the rest of the year has not been developed

- Lack of affordable accommodation: accommodation in Inuvik is expensive relative to the quality of the product
- Lack of packages: this is a result of the lack of sellable/market ready products in the area
- Lack of developed products: There are major pieces missing in the development of products, consistency, business sense, not enough demand
- Lack of reliable operators: there is an inconsistency in commitment from operators
- Lack of partnership between operators: the Inuvialuit Regional Corporation (IRC) owns Aklak Air and has recently purchased Western Arctic Nature Tours (WANT). The service that WANT is intended to provide is integral as it is the only inbound tour operator in the area. The problem is the lack of commitment/direction in operating it year round. As of October when WANT is called no one answers and there is no message service in place. In line with this issue local industry people that attended the focus group in Inuvik indicated the need to have a fulltime year round person to liaise with community operators and tourists wanting to visit the surrounding area. This would help ensure a real inbound service is offered with real products for the tourists. These group members are willing to pay the salary and come up with a job description to fit this need. One option is for this position to link into WANT as it already exists and if operated to its full potential, fills a gap in the area. This may work due to the industry backing both financial and physical.
- Lack of tourism training: the tourism training has not to date been tailored to NWT specific needs and lacks a long-term plan that coincides with development.

Opportunities

- Product development plan: introduction of a plan that would see the GNWT support a pre-determined number of businesses over an extended period of time
- Targeted marketing: market a specific product that is reliable such as Tuktoyaktuk day tours
- Fly-in and snowmobile access ice fishing: a market ready potential product that has been identified and now needs to be packaged and marketed

- Repeat passport program of 2003: this very successful program encouraged Dempster highway passengers to visit out-of-the-way places
- There is a need to do more research on the people that drive the Dempster as to who they are and what they want to do
- Snowmobile product: A potential winter/spring product that would include snowmobile one way to Aklavik and then drive the ice road back to Inuvik
- Winter experience packages: these might include ice road, snowmobile return trips or the above mentioned ice fishing trip
- Boat tours on Mackenzie River: a potentially viable trip that could fulfill the need for day trips from Inuvik

Threats

- Lack of long-term marketing plan: concern that the marketing is piece meal and is not accurately reflecting the products
- Not enough marketing money for the region
- Cost of insurance and business start-up: this is a big deterrent for all potential business owners as the industry is so seasonal and inconsistent.
- Collapse of existing big game markets: there has been a decline in the area of big game hunter visits. Most of the operators do not offer alternative activities to supplement their hunting business.

The Tuktoyaktuk area

Strengths

- Natural features: Northern Lights, Pingos, polar bears, muskox, caribou, whales, Arctic Ocean
- Local culture: There are two existing companies providing excellent cultural experiences for visitors
- Twenty-four hour sun in the summer: This has been a major attraction in the past with chartered jets flying up from southern cities for a round trip day excursion
- Northern most reach of Trans-Canada Trail on mainland: A local point of interest on the town tour
- Boat tours: There are two companies who can offer boat trips to various archaeological sites in the area

Weaknesses

- Lack of and quality of accommodation: There is no accommodation in the community that is high enough quality to meet the needs of consumer expectation.
- Garbage: As with most northern communities the garbage issue is an ongoing concern. Tourists are routinely surprised by the garbage in the communities
- No tourism association: There is a feeling of lack of cohesiveness and representation as far as tourism in the area

Opportunities

- Ice road: Inuvik is accessible by ice road for several months a year, there has been some interest from tourists in experiencing the ice road.
- Northern lights: Another winter alternative to attract visitors beyond the summer months
- Tourism training and workshops: The training required must be tailored to Northern needs (culturally sensitive, suitable to small, remote communities, suitable to all age groups, school children) and consider the high turnover rate of employees. This process can play a large role in the local buy in required to ensure the tourism industry is successful.
- Develop B&B's: Bed and breakfasts are a feasible business for those who own their own home and nice accommodation options are much needed.
- Twenty-four hour sun charters: This has been a major attraction in the past with chartered jets flying up from southern cities for a round trip day excursion. These flights could be offered from Vancouver, Calgary, and Edmonton by Canadian North and/or First Air
- Boat accessible archaeological site: Another option for day tours, currently nothing is offered and Inuvik is in need of day trip offerings

Threats

- Subsidized housing discourages business start-ups: The rules surrounding such subsidies are said to discourage some from operating home based businesses.
- Lack of funding to send representative at NWT tourism meetings: This is the same problem Inuvik expressed in that NWT tourism does not fairly represent the northern communities
- Lack of critical mass needed to start and operate a tourism business

- Lack of cooperation between operators: the two established operators in the community are working against each other
- Cost of insurance: This is an issue as an operator can be expected to pay for insurance and may not make any revenue for several months

The Sahtu Region SWOT Analysis

The information contained in this SWOT analysis was obtained through a focus group meeting and interviews with stakeholders in Norman Wells in late October.

Strengths

- Mackenzie Mountains: Have great potential for high-end hiking and skiing, touring and helicopter trips.
- Mackenzie River: Is a major travel route and an end point for river trips
- Great Bear Lake: Excellent fishing and hunting in and around the lake
- Canol Trail: A potential low adventure hiking trip with great historical value
- Canoeing: Access to several great canoe trips
- Accommodation in Deline: Some of the nicest accommodation in NWT are in Deline. Could be a part of ski/hike/fish packages.
- Big game hunting (sheep, bear, caribou, muskox): This is an extremely successful industry in the area
- Lodges with outpost camps: Great potential to use these for ski tour/hiking trips

Weaknesses

- Only one aboriginal owned lodge: For the most part the large operators in the area are not locally owned or operated
- Too many small businesses on Great Bear Lake: The area has lost its sense of exclusivity as several smaller operators have offered low quality trips which have ruined the reputation for all

Opportunities

- Day activities to keep hunters in area for one additional day: This is one of the major concerns of locals in the area as they would like to encourage travellers to spend time in Norman Wells

- Training of front-line employees: Customer service is typically below expected levels throughout the NWT and is not recognized by managers and/or owners to be crucial to the product/service offering
- Establishment of standards: There is a need for standards to be established for the entire territory.
- Snowmobile: One option is to offer snowmobile trips between the outpost camps, through the Mackenzie Mountains
- Skiing: As a proactive development idea it might be sensible to come up with alternative products to protect the big game hunting establishments in the Mackenzie Mountains. Big game hunting is virtually the only tourism product offered in the Mackenzie Mountains. These establishments have invested millions in remote lodges and outpost camps and have secured user licenses and land leases
- Helicopter skiing: Research can be done to determine the viability of offering heli-skiing in the Mackenzie Mountains. The skiing could complement the southern offerings as it would take place in their off-season
- Grizzly bear hunt: There has been a high interest from big game hunters to be able to hunt grizzly bears in the area

Threats

- Lack of trained workforce: The tourism establishments in are busy and are not able to find qualified employees to meet the demand of clients
- Lack of regional representation in NWT Tourism marketing campaign

Aboriginal Tourism SWOT Analysis

The information contained in this SWOT analysis was obtained by taking aboriginal tourism related information from the regional focus groups and input from the consulting team.

Strengths

- Unique and untouched wilderness setting, truly remote, relatively unpopulated
- Excellent hunting and fishing resources
- Extensive parks network

- Traditional and authentic native culture and traditions have been preserved in many communities
- Multitude of lakes and waterways, many of them historic
- Abundant wildlife including bears, moose, and caribou, muskoxen as well as the internationally significant polar bears and beluga whale on the north coast
- Access to lands and resources aboriginal peoples are moving forward with Land Claims and self-government

Weaknesses

- Present focus is in product development and marketing on hunting and fishing
- Lack of high quality nature/ecotourism products – anchor products
- Lack of established winter products (e.g. snowshoeing, cross-country skiing, snowmobiling)
- Limited accommodation facilities and few to none in the mid to high-quality range. Standards are too modest and will require upgrades
- Limited access to sufficient equity to obtain loans for development and maintenance of tourism products.
- Short length of summer tourist season. Season is short and very intense; winter products are difficult to develop
- Lack of entrepreneurial capacity among the people and communities
- Lack of leadership and co-ordination.
- Transportation, location and access issues apply all sectors and regions in the NWT but they are very apparent and prevalent for Aboriginal Communities due to their isolation. High cost of transportation especially to the northern regions. Length of travel time to remote regions can be a deterrent to attracting visitors. Limitations of flight scheduling to northern destinations and high airfares are a major and ongoing concern
- There is a lack of tourism infrastructure – accommodation, restaurants, transportation, visitor services, etc.
- Getting access to markets is a difficult task. Much like other sectors, Aboriginal businesses do not know how to make contact with markets (i.e. Europeans markets)
- Lack of packaging and partnering of tourism products and services among operators
- In some cases Aboriginal peoples need to be re-educated about their culture and traditional ways (e.g. need information on cultural/traditional foods – how to make, where to get ingredients, etc.)

- Stereotyped reputation of Aboriginal peoples and areas where Aboriginal businesses located

Opportunities

- The NWT showcases Canada's unique natural and cultural face. It is also a fast growing tourism market segment
- Substantial potential for development of authentic cultural products and experiences
- Combining culture with nature/ecotourism to create unique products
- Involvement of Aboriginals in the development of outdoor adventure and ecotourism products
- Wildlife viewing products with a focus on key species such as caribou, muskox, whales, bears and birds
- Development of winter products (e.g. snowshoeing, cross-country skiing, snowmobiling, dog sledding)
- Packaging of multiple activities and experiences for the consumer and sell through tour wholesalers and operators into the international marketplace
- Aboriginal wellness and healing techniques interpretation and learning vacation products.
- Tremendous potential to use traditional aboriginal building forms, design, motifs and artwork in the design of tourism attractions and facilities.
- Interpretation of historic and archaeological sites relating to aboriginal heritage.

Threats

- Tourism development must face the fact of some ignorance and misunderstanding of First Nations' traditions and how these traditions might be merged with tourism development.
- Strong competition provincially, nationally, and internationally for cultural products, hunting, fishing, and ecotourism especially from the neighbouring provinces and territories and the US border states.
- There is a concern when non-Aboriginal people develop and offer tourism products and services with Aboriginal cultural elements
- Combining the potentially conflicting activities of hunting and ecotourism could be a threat to building a recognized ecotourism product

- Stricter border controls for the US visitors, especially those participating in hunting activities. These may increase the time and ease of travel from the US
- Growing public opinion/opposition to consumptive activities such as hunting and to a lesser extent fishing.
- Lack of certainty regarding the availability of financial services for maintenance and upgrading of facilities.
- Lack of business skills particularly at the management level.
- Lack of interest from aboriginal people often due to the lack of knowledge
- Lack of retention when the few Aboriginal peoples do get involved with tourism. This can be attributable to other opportunities or it could in part be due to issues with subsidized housing e.g. if aboriginal people reach or exceed a certain income threshold they can lose their housing subsidy, which in some cases can be a significant deterrent. Also many aboriginal people prefer to work in mines, or the gas and oil industries. These industries can yield high wages for little knowledge or skill.
- Lack of tourism awareness and education particularly in the nature/culture/ecotourism sector. This is combined with a lack of business, marketing and management skills and a lack of front line skills in most tourism activities – hospitality, guiding, hard/soft skills etc.

Gap Analysis

The gap analysis is a grouping and summary of findings obtained through the tourism operator surveys, the community consultation and through observations.

The gaps have been grouped into the following categories:

1. Product Development
2. Aboriginal Tourism Products
3. Human Resources
4. Infrastructures
5. Marketing

1. Product Development

While it can be said that natural and cultural assets are what draw tourists to the NWT, tourism products are the backbone of the tourism industry. Tourism products provide the services and experiences necessary to accommodate and cater to the visitors' needs and expectations. Without adequate tourism products and services it is impossible to take advantage of the unique attractions and assets and to build a prosperous and competitive tourism industry. It is evident that the NWT contains world-class natural and cultural features and attractions. It is also evident that the NWT suffers from an acute shortage of market-ready tourism products.

A shortage in tourism products will also have a trickle-down effect and impact areas such as packaging and marketing. Without a sufficient inventory of market-ready products, it is impossible to build the packages that travelers are requesting, it becomes difficult to market a region or a destination and it is a challenge to compete with other Canadian and international destinations.

The development of tourism products in the NWT is hampered by factors such as:

- In many areas there is a lack of critical mass of tourists and tourism products necessary to sustain tourism businesses especially at the start-up stage.
- In many areas, there is very little interest in starting a tourism business or being involved in tourism.

- It is difficult to secure land access necessary to operate a tourism business.
- Potential tourism business operators lack skills and knowledge in the areas of small business management and operations, the tourism industry, accounting, marketing, product packaging and market research.
- There is a lack of professional development resources available to existing and potential operators.
- The lack of communication between businesses and between business and government.
- It is nearly impossible for an individual to obtain financing for a tourism business.
- A career in tourism is not seen as favourable to young workers especially when compared to careers in the oil, gas and mining industries.

2. Aboriginal Tourism Products

The potential for Aboriginal tourism in Canada and the NWT is enormous. Several Aboriginal communities in Canada have shown the enormous potential for Aboriginal tourism, while creating strong, sustainable and self-sufficient economies. The motivator trend among travelers is a growing demand for authentic experiences, as well as a demand for culture and wellness.

As a tourism destination, few areas in Canada can compete with the diversity of products available in the Northwest Territories. This is certainly true of the Aboriginal products potential. There is no doubt that Aboriginal culture is a prime area of strength for tourism development in the NWT.

Different definitions of Aboriginal product have been proposed by various sources in the industry. These definitions range from the inclusion of only those products and services that contain cultural components or themes, to all-inclusive definitions, which state that ownership is the only criteria. It is out of the scope of this document to argue for one definition over the other. Hence, in order to maintain maximum flexibility, the following broad definition will be used:

> "An Aboriginal tourism product or service is one that: (1) is owned in full or in part by an Aboriginal person or entity and (2)

includes authentic Aboriginal cultural and/or historical components".

Aboriginal tourism was identified as a gap based on an analysis of the survey results, the feedback obtained through the community consultation process and through observations.

The survey results

The survey results show that 35% of the businesses that responded to the survey have some component of aboriginal involvement. This aboriginal involvement is mostly in the form of ownership (partial or total) of a tourism business. A closer inspection of the data reveals that aboriginal ownership does not necessarily translate to an aboriginal tourism product (although there is still much debate on the definition of an aboriginal tourism product). For example, 22 of the 113 aboriginal owned businesses are in the transportation sector (see table 42). It can be assumed that these businesses would not be perceived as cultural/traditional aboriginal tourism products by tourists. A tourism product, even if offered by an aboriginal, will not be perceived as an aboriginal tourism product if it is delivered without some authentic cultural aboriginal content. For example, an aboriginal hunting operator offering a standard hunting package without any traditional/cultural aboriginal content is no different than a non-aboriginal operator offering the same product.

The community consultation

It was articulated throughout the community consultation that communities and individuals want to see more aboriginals involved in the development and delivery of tourism products that showcase the aboriginal culture.

Table 42: Aboriginal Owned Businesses (whole or in partnership) by Sector

Sector	Frequency	Percent
Accommodation	32	28
Food & Beverage	3	3
Transportation	22	19
Attractions	11	10
Adventure/Recreation	33	29
Events & Conferences	6	5
Travel Trade	4	4
Tourism Services	2	2
Total	113	100

Table 43: Aboriginal owned Adventure/Recreation Businesses (whole or in partnership)

Product*	Frequency	Percent
Outfitting	10	24
Hunting	9	21
Fishing	8	20
Dog-sledding	1	2
Canoeing	1	2
Nature Viewing	3	7
Wildlife Viewing	2	5
Aurora Viewing	3	7
Cultural Interpretation	3	7
Total	40	100

*Includes products secondary sector hence greater than the frequency above noted.

3. Human Resources

Tourism is an extremely labour intensive industry. The entire tourism service delivery and experience is derived from the interaction between the service provider and the client; it is really a "people business." The main interaction between provider and client happens at the front line. The front line is where the client is first greeted (first impressions) and also where the client is last serviced (last impressions).

It is quite apparent that the NWT suffers from a shortage of tourism trained workforce. The existing tourism workforce has very little training and expertise in tourism. There is a lack of professional development and hospitality training for tourism workers. The lack of tourism and hospitality skills is especially noticeable outside of Yellowknife. Additionally, the pool of individuals that constitutes the potential tourism workforce is more interested with the prospects of work in other sectors like oil, gas, and mining. The lack of tourism training affects the existing tourism products and the future development of the industry.

4. Infrastructure

The tourism industry is dependent upon physical infrastructure. Physical infrastructure refers to the man-made capital which is required to produce

tourism products for visitor enjoyment, such as accommodation, food and beverage establishments, attractions, campgrounds as well as transportation infrastructure such as roads and airstrips. Without the required infrastructure, tourism operations can not service visitors, nor can visitors access tourism products.

When compared to other first-world international destinations, tourism infrastructures in the Northwest Territories do not compare favourably. Accommodations, restaurants and attractions are insufficient in quantity and offer deficient or inconsistent quality. For example, only a few accommodations in Yellowknife and a few lodges scattered around the NWT can be described as quality establishments. The rest of the NWT's accommodation sector is quite primitive and of low quality. The road system is undeveloped or primitive where it is developed. Other than natural attractions, there is very little in terms of developed tourism attractions. Many establishments and attraction are not market-ready and need to be further developed/enhanced in order to be taken to the international tourism marketplace. Additionally, it could be said that there is a disconnect between the marketing materials and infrastructures. The marketing materials show the best infrastructures and attractions that the NWT has to offer, which is not necessarily representative of the majority of the infrastructures and attractions available, nor is it representative of the average quality.

The lack of developed infrastructure is a sufficient disincentive to entire markets who would otherwise travel to the NWT and enjoy its natural and cultural assets.

5. Marketing

Because of its low population, geography and level of development, one of the particularities of the Northwest Territories' tourism industry is that almost all tourists originate from outside the territory. This means that marketing efforts must target national and international markets. It also means that most of the competition will come from overseas and international destinations, North American destinations and Canadian destinations such as the Yukon and Nunavut. Competing on the international scene or with destinations such Yukon and Nunavut is complex and expensive. Additional marketing funds will be needed to attract international clients and to be at par with the marketing spending of competing destinations.

The community consultation process revealed the following in regards to marketing:

- There is wide support and agreement with the efforts of NWT Tourism in promoting the NWT as a destination
- The regions feel that they lack the necessary resources to compete with other regions and attract visitors once they are in the NWT
- There appears to be a lack of tourism coordination and organization at the regional level
- The regions feel that they lack representation in territory-wide tourism efforts

Recommendations

The recommendations have been grouped as follows:

1. Territory-Wide Tourism Development Strategy for the NWT
2. Product Development Strategy
    a. Encourage and support the creation of new tourism products and businesses
    b. Encourage and support existing tourism products and businesses
    c. Emphasis on aboriginal products by encouraging and supporting aboriginal involvement in tourism products and businesses
3. Human Resources Development Strategy
    a. Develop the existing and future tourism workforce
    b. Advocate the benefits of tourism for the NWT
4. Infrastructure Development Strategy
5. Marketing Strategy

1. Territory-Wide Tourism Development Strategy for the NWT

It is critical that a territory-wide tourism strategy be developed and implemented. A territory-wide strategy will offer direction and coordination of resources from different partners involved in tourism and economic development.

The main objectives of a territory-wide tourism development strategy should be to:

- Develop a unified strategic plan under which all tourism development will fall
- Develop strategies that relate to product development, human resources development, infrastructure development and marketing
- Develop better coordination between government bodies at the territorial and federal levels
- Establish and clarify jurisdictions, responsibilities, and roles.
- Develop a growth management strategy that includes such things as carrying capacity limits based on ecological, economic, and social/cultural criteria.
- Develop a strategy for funding priorities
- Develop a tourism strategy and action plan for each region

2. Product Development Strategy

The development of tourism products is a win-win-win situation. Tourists gain because they have another opportunity to experience a showcased product. Operators benefit for obvious economic reasons. Communities profit as tourists are more inclined to stay longer and spend their dollars locally.

The development and support of any new tourism products along a hub model whereby its centre is either a community with a high quality tourism product or the product itself. The spokes radiating outwards from the hub are secondary products that are smaller, require less capital investment and risk, are perhaps more specialized and hopefully are not of a lesser quality.

The NWT is rich in cultural and natural resources. These resources form the basis of extensive tourism opportunities. Most current and future tourism opportunities can be grouped into nature-based and eco-adventure tours, lodge/retreat development and culturally driven experiences. Hunting and fishing activities should also be included under present opportunities, however market demand data indicates that these are non-growth sectors and in some cases are experiencing drastic downturns. Aboriginal culture will influence the development and delivery of all categories of tourism products.

The challenges facing new or existing tourism operators in trying to achieve financial stability include the following:

- Lack of critical mass of tourists and tourism businesses necessary to sustain a tourism business

- Potential operators' lack tourism industry knowledge and expertise

- Potential operators' lack of business operations and management skills and expertise in areas such as:
    - Small business management
    - Accounting
    - Human resources
    - Marketing
    - Financial planning
    - The tourism trade and marketplace

- Difficulty in obtaining traditional financing for tourism business start-ups

- Availability and cost of insurance

- Land access issues

The benefits of a tourism business and product development plan include:

- The creation of new and needed tourism products

- Economic development and diversification in a variety of communities

- Providing an alternative to the oil, gas and mining industries

- Control over the type and quality of the tourism products

- Following the lead of the strategic plan for tourism development in the NWT

Within a framework outlined in a territory-wide tourism development strategy, the main objectives of the NWT product development strategy should be to:

a. Encourage and support the creation of new tourism products and businesses

b. Encourage and support existing tourism products and businesses

c. Emphasis on aboriginal products by encouraging and supporting aboriginal involvement in tourism products and businesses

a. Encourage and support the creation of new tourism products and businesses

- Develop an appropriate regulatory regime that supports and encourages the development of quality products and businesses

- Enhance the viability of new tourism products and businesses by supporting entrepreneurs in the success and longevity of business start-ups

- Assist in the development of internationally competitive tourism businesses offered in all four seasons

- Development of more comprehensive packages offering outdoor activities mixed with cultural and learning experiences.

- Resolving land access issues or providing a means for tourism operators to access land

- Development of operator business skills in the areas of:
    - Small business management
    - Strategic planning
    - Accounting and financial management
    - Human resources
    - Marketing
    - Financial planning
    - The tourism trade and marketplace
    - Market research and product development
    - Product marketing and partnership marketing

    - Development of a five-year public/private partnership business start-up program. The program essentially involves a plan that would see the government support chosen entrepreneurs, businesses or products for a period of five years at the start-up phase. The support plan would involve ongoing financial assistance, tourism business operations and management training, coaching and mentoring for a period of five years.

b. Encourage and support existing tourism products and businesses

- Improvement in the quality of current products that are not "market ready."

- Assists existing business diversify and improving the utilization of natural resources to effectively access emerging markets for identified tourism trends

c. Emphasis on aboriginal products by encouraging and supporting aboriginal involvement in tourism products and businesses

Aboriginal tourism has made great strides in the last decade, especially in Canada. For many, Aboriginal tourism is associated only with culture, history and nature, when in fact the industry is beginning to expand to include the development of many new products in such categories as:

- Tour routes
- Aboriginal-themed accommodation (hospitality and wellness)
- Aboriginal-themed restaurants (and food experiences)
- Casinos (on reserve)
- Tour packages including guide outfitting, eco-adventure and cultural tours
- Aboriginal cultural centres (and culture-related activities)
- Wholesale/retail products (arts, crafts, jewellery, production, distribution).

Developing Aboriginal product is not an easy process however, and there can be many issues involved. The natural and cultural resources necessary to create tourism opportunities exist; however, many communities lack the physical infrastructure, investment and human resource capacity to fully benefit from a well-diversified economy that includes tourism. If planned and executed correctly, benefits to Aboriginal communities from tourism include economic return, employment and increased community capacity.

The overall goal for Aboriginal tourism development in the NWT should be to help create a strong and viable industry throughout the territory,

which will be a major economic contributor to Aboriginal communities and promote and enhance Aboriginal culture.

Recommended actions include:

- Developing and implementing an aboriginal tourism business and product development program similar to what is suggested in section a: "Encourage and support the creation of new tourism products and businesses".

- Establishing a NWT Aboriginal tourism association which can assume a leading role in the development of the sector. For example, British Columbia has the Aboriginal Tourism Association of BC.

- Creation of an accreditation process that would certify tourism products and services as authentic aboriginal products and services

- Consideration should be given to the creation of a unique NWT Aboriginal tourism brand. Branding can provide a measure of protection for Aboriginal culture in the NWT, as well as create a distinct marketing advantage by offering an authentic, consistent product to visitors.

3. Human Resources Development Strategy

A human resources development strategy should be developed and implemented. The main objectives of the strategy should be to:

a. Develop the existing and future tourism workforce

b. Advocate the benefits of tourism for the NWT

a. Develop the existing and future tourism workforce

The NWT needs to develop its current and future tourism workforce. The development of the workforce needs to be addressed in a multi-pronged strategy:

- The development of the tourism workforce through the education system
    - Secondary School System: Introduction to tourism in grade 9 and 10; Tourism specializations in grade 11 and 12
    - Post-Secondary School System: Certificates, Diplomas, Transfers into existing degree programs

- Access to the education system through:
    - Traditional delivery
    - Online/distance delivery
    - Satellite delivery
    - Module delivery

- The development of the tourism workforce though professional development programs in:
    - Hospitality and customer service
    - Small business management
    - Legal issues and risk management
    - Tourism marketing
    - Dealing with the travel trade
    - Product packaging and bundling
    - Product development
    - Product pricing
    - Supervisory skills

- The development of a human resources training program specifically designed for aboriginals such as:

    - Basic hospitality programs such as *"First Host"* in BC could be made available to communities through-out NWT. *First Host* embraces the principles of *Super Host* (also developed in BC), but incorporates aspects specific to First Nations.

    - Aboriginal guide and interpretive training. Guides for Aboriginal cultural tourism products and adventure/ecotourism products all need effective training.

    - Training for Bands, Councils and community leaders. Training will also need to be provided to community decision makers in

the areas of entrepreneurship and land use planning and good governance in relation to tourism.

b. Advocate the benefits of tourism for the NWT

There is a general lack of understanding, awareness and appreciation about the tourism industry. In order for the residents of the NWT to be engaged in all aspects of the tourism industry, it is paramount that they be informed on the industry itself.

A tourism advocacy strategy needs to be developed and included the following goals:

- To increase the profile of tourism as an important economic activity generator
- To increase the awareness of tourism careers as viable alternatives to careers in the oil, gas and mining sectors
- To increase the involvement of the NWT tourism operators in promoting their own industry
- To increase the profile of NWT Tourism
- To increase the level of tourism knowledge amongst the general populous
- To develop a culture that understands, supports and embraces tourism

The tourism advocacy strategy could contain initiatives such as:

- Career fairs. Career fairs to be hosted in key communities and high schools. The fairs should mostly provide information on career possibilities and tourism education
- Tourism Spokesperson. A recognizable individual, celebrity or government official to become a spokesperson promoting tourism

- Success Stories: Tourism success stories should be publicized and used in career fairs and other public relations initiatives

- Public relations campaign. A public relations campaign developed especially to promotes the economic benefits of tourism, tourism careers, education programs as well as any relevant tourism initiatives

- Tourism travelling show. A "travelling show" that promotes and explains tourism to communities

- Community forums hosted by NTW Tourism. These forums hosted in targeted communities will provide the opportunity for NWT Tourism to promote tourism in general, product development initiatives and educational opportunities

4. Infrastructure Development Strategy

The NWT needs to develop an infrastructure development strategy that will include:

- Significant accommodation upgrading – this is required throughout all of the NWT especially in the more remote regions. In order to tap into the large "soft adventure" market there is a need to develop mid to high-range accommodation facilities preferably in attractive natural settings. The market is looking for attractively designed facilities which fit with the natural settings and include such amenities as private bathrooms for guests. Accommodation facilities include adventure and ecolodges and B&Bs

- Upgrading existing tourism facilities to marketplace standards in order to be considered "market ready."

- Developing of Aboriginal themed products around flagship facilities/attractions/activities to draw attention to the Aboriginal sector

- Developing supply chain standards such as certification and quality assurance. Some type of certification or quality assurance should be

specified and provided for various categories of accommodation facilities, attractions and other products and services

- Developing community pride and beautification initiatives. Physical appearance of communities can be a very positive or negative factor for the success of Aboriginal tourism. Most Aboriginal communities are situated in attractive natural settings and in many cases an overall cleanup of the community is all that is required. In other communities major demolition, restoration or maintenance of buildings and infrastructure, and landscape design will be required.

- Paving key highway and access roads

- Offering incentives for the development or upgrading of tourism infrastructure. These incentives could include tax breaks, seed funding, subsidies and government grants

- Developing a strategic hub model where key anchor attractions are developed. The anchor attractions act as hubs and attract supporting and spin-off tourism products and services

- Developing and encouraging private – public partnerships

5. Marketing Strategy

A marketing strategy should be develop and include the following components:

- Partnering with the Yukon and Nunavut to develop and implement a Northern Canada tourism marketing plan

- Develop regional marketing strategies that accurately reflect the geographic and cultural realities and the profiles of each of the regions

- Ensure a stronger presence of the regions in the marketing initiatives undertaken by NWT tourism

- Create a tourism association for each of the five regions of the NWT

- Ensure a stronger Aboriginal presence in NWT marketing campaigns

- Develop strategic tourism packages geared towards specific market segments.

- Provide adequate resources to the regions so that they can either individually or in regional partnerships, engage in some level of promotion of their own tourism attractions, facilities, activities and features.